Employee Fitness "The how to..."

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Rationale

RATIONALE FOR EMPLOYEE FITNESS PROGRAMS

Robert S. Wanzel, Ph.D.

Professor Wanzel is Director of Laurentian University's Sports Administration program.

Professor Wanzel has studied employee fitness programs at industrial worksites across North America. His research has focussed on program drop-outs, the effect of recreation on productivity and program participation. Often called upon to present a rationale for employee fitness programming, Professor Wanzel has developed a unique role-playing discussion situation in which the representative of the employee fitness agency confronts the questions and concerns commonly raised by corporate executives.

Introduction

The success of employee fitness as a concept in business and industry is partially dependent on its viability in corporate terms. The term "bottom line" applies as much to employee fitness as it does to any other aspect in business and industry.

Should Canadian companies become involved in starting employee fitness programs? There is no set answer to this intriguing question. Every company's response will be based on its own particular ethos, and on its perceptions of such a program's effects on certain facets of corporate life.

Unfortunately, this question all too often elicits a negative response from corporate leaders. However, despite the diversity of corporations and their philosophies, there are some inherent similarities in these negative responses. By zeroing in on these common sentiments, it is hoped that those involved in organizing and/or establishing employee fitness programs will be able to prepare positive responses to the queries that they will encounter.

In the interest of realism, the pros and cons of employee fitness programming are presented below in the form of an ongoing dialogue between an interested corporate executive and a representative from an employee fitness service agency.

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Synopsis: Macdonald & Garneau is a large engineering corporation, with a head office in Toronto and smaller branches in various Ontario regional centres. Chairman of the Board Marcel Garneau, a keen fitness enthusiast himself, is intrigued by the idea of instituting an employee fitness program, but is not convinced that the benefits will outweigh the problems and the cost of such a venture. Presenting the positive aspects of

employee fitness programming is Greta Pawlenko, a representative from the Employee Fitness Service Agency.

Health Care Costs

Garneau -- I've done some preliminary research into employee fitness expenditures, and I've discovered that it costs $40 to $60 per square foot to build an exercise facility. This means that a 3,000 square foot facility could cost us from $120,000 to $180,000, plus equipment, plus maintenance, *and* the cost of a fitness director. Given these figures, do you really think an employee fitness program can stand up under a cost benefit analysis?

Pawlenko -- Before I answer that question, I'd like to give you some figures on the high cost of employee *unfitness*. Did you know that more money is spent per capita on health care in Canada than in any other nation in the world? $2 billion of our health care budget is spent on the treatment of coronary heart disease. The cost of treatment in Ontario alone is $200 million, and the figure rises every year. A. U.S. survey has shown that heart attacks among middle management people alone, sets industry back $700 million every year.

Garneau -- The figures certainly are staggering.

Pawlenko -- I think if we look at employee unfitness in this light, we can see that it is a very costly segment of a company's business because, as you know, employers pay a huge amount for health care: Xerox, for example, pays $58 million yearly and General Motors $825 million.

Garneau -- H'm...

Pawlenko -- On the other side of the coin, we know that regular physical activity has a positive effect on the heart, the blood vessels, the blood, the lungs and body dimensions, all of which add up to an increased physical work capacity.[1] We also know that regular physical activity has certain beneficial, physiological effects, such as a reduction of tension and stress.[2]

Garneau -- Well, sure I know that limited physical activity is one factor in cardiovascular disease,[3] and that desk-bound executives are one of the highest risk groups for suffering a heart attack.[4] Why do you think I jog daily?

Pawlenko -- Exactly! And I think we can see evidence of this new awareness in the individual focus on fitness currently going on throughout Canada today. Look at the number of people out jogging,

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1. Gottheiner, 1969
2. Chevrette, 1969; Wallin and Schendel, 1969.
3. Fox and Skinner, 1964; Kilbom, 1969; Raab, 1964; Fleck, 1971.
4. Hein and Ryan, 1960; Kilbom, 1969; Russek, 1959.

bicycling, walking, canoeing, skiing! Even our schools are now beginning to analyze the amount of activity that they offer to our children. In fact, many of the schools are introducing individual activities that have a carry-over value for the rest of the students' lifetime.

Garneau -- Obviously this future work force will have different job expectations, and not only in the field of on-the-job fitness! But what about now? You still haven't answered my initial question. And, while we're on the subject of costs, there are a couple of other points to be considered.

What about the legal ramifications of an employee fitness program? If one of our employees is injured while participating in the program, we could end up with a very costly law suit.

And when are employees going to use such a facility? If they take time off during the day, not only is productivity going to suffer during this period, but the company will have the added cost of paying our people while they are engaged in this agreeable but non-productive activity.

Pawlenko -- I think the important point to consider is not so much what an employee fitness program will <u>cost</u> Macdonald and Garneau, but whether it will <u>save</u> you money, and, if so, whether these savings will outweigh the costs. In other words, can we look at employee physical activity as a preventative measure, and therefore as a cost- saving device?

We have considerable critical evidence to indicate that regular exercise can prevent or delay the onset of cardiovascular disease, and even the aging process itself. We also know that if a fit person suffers a heart attack, it is less likely to be lethal compared to the unfit individual. Exxon (U.S.), which has an employee fitness program, has found that their executives who participated in the program had fewer heart attacks than non-participants.[5]

The Xerox Corporation has estimated that it costs approximately $600,000 to replace an executive, when you consider life insurance, fringe benefit claims, the loss of knowledge, and the time, energy and cost of recruiting a replacement.[6] So ...

Garneau -- So, what you're actually saying is that healthy bodies protect the corporate investment in our employees' brains.

Pawlenko -- Right. Life of Georgia, a U.S. insurance company, has also come to this conclusion. They feel that, as a result of their employee fitness program, they have added years to the lives of their executives.

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5. Koerner, 1973.
6. Donoghue, 1977.

Closer to home Quasar, Systems Ltd.,[7] in their investigations into the relationship between physical fitness and the cost of health care, found that people with higher levels of fitness tend to have lower O.H.I.P. medical claims. Their findings also showed that if all Ontario adults aged 20 to 69 years were at least at an average physical fitness level, O.H.I.P. claims could be reduced by $31 million. A saving everyone, including industry, would benefit from! They, too, found that people with higher levels of physical fitness tend to have reduced incidence of coronary heart disease.

Garneau -- Quite impressive.

Pawlenko -- I think these facts indicate that companies should at least investigate totally an employee fitness program. It could well be costing Macdonald and Garneau money if you don't!

Absenteeism, Staff Turnover, Morale

For the corporate world, governed by the profit and loss statement (the "bottom line"), the viability of employee fitness programs is often hard to measure.

Garneau -- If we were to institute an employee fitness program, can you really say that the prospect of exercising at work will be enough stimulation to, say, reduce absenteeism? And even if we should have a reduction of absenteeism, how can we be sure that this is due solely to the fitness program, rather than a combination of other factors?

Pawlenko -- Fortunately, we do have some positive measurable evidence on this point. For example, in a study Peoples Credit Jewellers did on the employees involved in their fitness program, they found that non-paid absenteeism had dropped 23% since the program began.

In Sweden, to cite a further example, the Goodyear Plant found that their absenteeism decreased 27% for the same reason.[8] Another recent study of two Toronto[9] companies showed that uncertified absenteeism (less than three days) declined in the company that instituted an employee fitness program. This company expects the decline in absenteeism will save them $15,000 to $23,000 per year, providing the trend continues. Canada Life found that absenteeism decreased by 42% among employees who were keen fitness program participants, and by 20% for the rest of Canada Life's employees.[10]

And that's not all. A scientific study done in the U.S.S.R. has revealed that regular exercise can reduce absenteeism from three to five days a year per person.[11]

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7. Quasar Systems Limited, 1976.
8. Condon, 1977.
9. Cox, 1978.
10. Cox, Michael. Personal communication with the author.
11. Blue Cross.

Garneau -- O.K. Certainly sounds very encouraging. But let's look now at productivity. If we institute a non-work hours exercise program here at head office, don't you agree that eventually this will lead to exercise during company time, with a resulting decline in productivity?

Pawlenko -- On the contrary, both subjective and objective evidence tends to show that productivity is not unduly affected by an employee fitness program. In fact, productivity seems to increase!

Garneau -- H'm. Well, bring on your statistics, and convince me.

Pawlenko -- With pleasure! An interesting subjective evaluation done by the National Aeronautical and Space Administration in the United States found that there was no reduction in productivity among a number of corporate executives who took time off to exercise.[12]

Garneau -- Frankly, I'd hardly consider a sample study of corporate executives, most of whom are highly motivated and career oriented anyway, to be indicative of the expected results of such a program.

Pawlenko -- More concrete results have been documented by the Federal Government. In a survey of O.H.I.P. data processors, Health and Welfare Canada found that one month after the introduction of their Exercise Break Program, productivity increased in the range of 4%.[13]

In the same vein, the Xerox Corporation believes that in the 11 years they have had their own facilities and activity programs, productivity within the company is definitely up.

Garneau -- Sounds good.

Pawlenko -- Ah, but that's not all!

Garneau -- I should have known!

Pawlenko -- A recent attitudinal study has indicated that if employees were given time off during the week for an activity program, 65% of those surveyed felt that there would be no loss in productivity. I'll admit the evaluation was a subjective one...Incidentally, the sample was made up of white collar workers. However, in light of the objective data we do have, these results do not seem unrealistic.

There is yet another benefit accruing from an employee fitness program that's worth looking at, and that's the effects of such a program on employee morale.

Garneau -- Yes, I've heard that a fitness program does wonders for morale. Certainly would be great if it did, but I find it hard to see the connection.

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12. Blue Cross
13. Keir, 1978

Pawlenko -- The effect of an exercise program on employee morale is quite intriguing. When a company institutes a fitness program, it is actually telling its employees that they are important to the company - their well-being is of concern to the company. In return, being a participant in such a program influences how employees think and feel about themselves *and* their job situation. This seems to lead to a decline in alienation between employees and the company, and can have a positive effect on how employees perform for the company.

Garneau -- I notice you say such a program "seems" to cause a decline in worker alienation. I take it this means there is no way of actually measuring the effects of such a program on employee/employer relations?

Pawlenko -- Yes, I agree it is an elusive factor to measure. However, in a study done a few years ago, it was found that 69% of the Canadian sample felt that company facilities and exercise programs would improve morale.[14] An astute employer should certainly be able to maximize this improvement in employee morale, especially when it so often leads to increased communication within a company.

Garneau -- So far, we have looked at the effects of a company physical fitness program on the people we have working for us now. But how does such a program rank as a fringe benefit enticement? By this I mean, how valuable is such a program as an enticement for executive retention and recruitment? At present, we provide our top people with memberships in some of the best clubs in the city as an added fringe benefit.

Pawlenko -- What you want to know is whether an employee fitness program here at Macdonald and Garneau will reduce corporate turnover?

Garneau -- Not only that, but also how will such a program serve as an enticement to new people?

Pawlenko -- We know that 30% of top U.S. management people change jobs every year, and there's no reason to believe the figures are any different for Canada.

Garneau -- Don't we know it!

Pawlenko -- Moreover, surveys show that 35% of middle management want a career change .... not just a job change, but a career change. It's quite possible, don't you think, that these percentages are a sign of work pressures that activity might alleviate? Canada Life, for example, has found that the turnover rate for fitness program participants is only 1.5% as opposed to the 15% turnover rate for the rest of the Company's employees.[15] In fact, many companies have indicated that their activity facilities tend to reduce employee turnover, as well as serving as a recruitment tool.

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14. Wanzel, 1974.
15. Cox, Michael. Personal communication with the author.

Garneau -- So much for question one! But what about a company fitness program as a recruitment tool?

Pawlenko -- The Emhart Company ran an ad for their company in some leading business magazines, including the *Wall Street Journal* and *Forbes Magazine*. This ad related how 30% of Emhart's executives and staff kept in top shape through Emhart's unique before-and-after work fitness program. Emhart stated that they believed physical fitness breeds fiscal fitness. Within weeks, Emhart received 66 responses, 16 from people wanting to join the firm. Needless to say, the Emhart management was very pleased with the results. They fully believe (and with good reason) that recruitment and retention can be enhanced by an exercise program for company employees.

Garneau -- That's all very well, but I think we've both overlooked one rather important element - salary increases. Surely, if given the choice between a salary increase or seeing that money sunk into a fitness program, employees are going to opt for the former?

Pawlenko -- Not necessarily. I think we've reached a point where quality of life looms very large in the priorities of many employees, and can outweigh the raw attraction of a salary increase.

The Agfa Gevaert Company in the U.S., for example, has found this to be the case. Agfa not only has a company exercise program, but its members also compete in the Tyler Cup, an athletic competition staged between different companies. The competition is held annually in Dallas at Ken Cooper's exercise location...

Garneau -- Is this the Ken Cooper of Aerobics fame?

Pawlenko -- Yes. Anyway, Agfa's personnel manager believes that their exercise program, as well as the competition in the Cup, has actually attracted a national sales manager and three production managers to the company. What is even more interesting is that a subjective evaluation by Agfa executives indicates that the company's top producers and idea people are in the fitness program.

Garneau -- I guess we can assume that Agfa management considers putting money into exercise facilities is better than putting money into salaries, at least as far as employee recruitment is concerned.

Pawlenko -- Precisely - and I think you should add employee retention to recruitment to have a true picture of Agfa's views on the subject.

Garneau -- We've talked a lot about the benefits of such a program on our people's physical health. What about employee mental health? Will employees really be "sharper" as a result of such a program?

Pawlenko -- This is, obviously, extremely hard to measure. But I think if we add up the benefits in terms of improvements in product-

ivity, in morale, in cutting down on absenteeism and in employee retention, then I would say that we are looking at employees, who by default, are more "on the ball".

Also, we do know from a five-year study of their fitness program completed recently by the New York State Education and Civil Service departments, that the program has reduced risk factors, eased health problems, as well as cutting down on absenteeism.[16]

Onsite and Shares Facilities

Macdonald and Garneau is partially sold on the idea of starting an employee fitness program. The question now is whether they should have their own facility and program, or utilize outside facilities.

Garneau -- If we go ahead with a fitness program, my own feeling is that we should come to an arrangement with an outside fitness facility. It'll certainly cost us less - no maintenance, no full-time director's salary and no equipment costs.

Pawlenko - Well...

Garneau -- Just a minute. These aren't the only considerations. Add to the first three the fact that if we go outside for a program, the participation rate for our people can drop - and you and I both know, dropout rates from these programs are incredibly high - and Macdonald and Garneau will not have to sustain the ongoing expense of a failed program, nor the renovation expense of turning our physical fitness ghost-town back into a productive working area.

Pawlenko -- I understand all your concerns, but...

Garneau -- I'm afraid there are more.

Pawlenko -- I'd be disappointed if there weren't. But let's look at these first. To begin, let me say that I believe outside facilities are a last resort.

Yes, I agree dropout rates are high, and therefore costly to the company. But, let's consider the reasons for high dropout rates.

A recent fitness program adherence study found that facility inaccessability, *i.e.*, when the exercise facility is not located in the building where the employee works, is one of the major factors contributing to program dropouts. Obviously, this is because employees must spend time travelling to and from the facility, something many will be unwilling to do, especially in inclement weather.

The other chief factor contributing to program dropouts, is daily routine disruption. This term refers to employees who perhaps work

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16. Blue Cross.

out before or after work, causing them to leave home earlier or arrive home later than normal. The resulting disruption of routine may cause a variety of problems within the home which, when compounded, may lead to employees quitting the program.

Obviously, an easily accessible corporate fitness facility is an almost perfect solution. In fact, a recent study indicated that 65% of Canadian employees surveyed would like to have the company provide facilities and programs on site.[17] Incidentally, an on-site fitness facility also meets the needs of those employees who pass up participating in the exercise program owing to a perceived lack of time due to business reasons.

Garneau -- Fine. All these reasons are valid. But what about the cost of establishing and running the facility?

Pawlenko -- Many successful programs have shown that elaborate facilities are not necessary. It's enough to just start with a shower and change area. If you have unused space in the building, that you could convert with minimum renovation, all the better.

Garneau -- Well and good - but the program will need a director, which means another salary.

Pawlenko -- You're right in as much as leadership of the program is of vital importance. But rather than have to pay a professional, you might find leadership will be on a volunteer basis from an employee within Macdonald & Garneau.

Garneau -- Maybe so, but again this involves a cost to us for training our own fitness leader.

Pawlenko -- No! No! Your volunteer could well have an appropriate background to provide some leadership. In any case, it's not unusual to find that a number of employees will decide to go to an outside fitness center or workshop just to get some instruction on how to start their own program. By the way, if you do have to engage a professional advisor, why not acquire his or her services on a part-time basis?

Garneau -- So we offer our own program of calisthenics. So far, so good. But I'm sure that after a very short time, the participants will want to substitute their calisthenics for games, say squash, or handball. From there, it's only a matter of time before we'll be getting a petition to turn the mailroom into a swimming pool, not to mention saunas, whirlpools, etc.!

Pawlenko -- I can see your program's going to be a great success! Seriously, I don't think your scenario is quite as colourful as you paint it. But if you should find your employees are that ambitious, what about exploring shared facilities with other companies in the building?

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17. Wanzel and Davidson, 1977.

Garneau -- A happy middle ground? Actually, we did think of that. As a matter of fact, we are presently exploring the idea with the building's owners. However, from just tentative talks with the developers, they seem rather skeptical of the idea. They say there would be problems as to how much they would charge each company for use of the facility. Would it be a flat monthly rate, regardless of whether one or all of our people used the facility, or would they charge a set fee per month for each participating employee? What about time scheduling? And then there's the maintenance costs, the laundry costs, and so on.

There was some feeling that these various problems could be solved if the developer just leased space to a private fitness concern, who would in turn, sell memberships to the building's tenants. What do you think of that idea?

Pawlenko -- There are examples of successful shared facilities. And certainly they do have the added benefit of bringing your employees together with employees of other companies, which can often lead to the forming of valuable acquaintanceships - an exchange which may tend to bring a new slant to some of your company's problems. Personally, I think any of these headaches regarding shared facilities can be solved by firms intent on providing a fitness program.

Just one note of caution: I think if a private fitness corporation runs the program, the spirit of elan and that sense of belonging within the company are not the same as if Macdonald & Garneau offers the program. I think the experience of Life of Georgia Insurance Company best sums it up. An executive of Life of Georgia maintains there is just no substitute for the convenience of their own facilities. Incidentally, they also found that their building's exercise facilities not only attracted new tenants, but also kept existing tenants, even when rents and location were better somewhere else.

Garneau -- I gather the message is that we really should make a thorough investigation of on-site facilities before we go any further.

Pawlenko -- Well, I think you'll be agreeably surprised at what you discover.

Philosophical Contentions

In almost any discussion concerning the feasibility of establishing an employee fitness program, company executives will raise certain philosophical dilemmas that they feel stand in the way of instituting such a program.

Garneau -- As you know, Macdonald & Garneau has four other branches in the province. Suppose we institute a fitness program here at head office, and it's quite feasible that we should. But given staff size and the far-flung nature of our regional operations, it is

hardly viable to offer similar programs at our branches. Yet, we can't offer an amenity to our Toronto-based employees and deny it to the others just because they're based in Timmins or wherever.

Pawlenko -- I don't think this all or nothing approach is called for. Many companies with numerous office locations have not experienced difficulties with their employees by putting exercise facilities in only some locations. It simply is not true that all employees will demand facilities. The Xerox Corporation, Life of Georgia and American Can are just three examples of companies whose facilities are situated only in certain office locations, and there have been no problems with their other employees.

Garneau -- All right, say we go ahead with a program here in Toronto, do we open it just to management personnel, starting perhaps, at the supervisory level, or do we offer it to all our people?

Pawlenko -- There are two schools of thought on this issue. One school maintains that there should be one activity centre for executives and one for all other employees. The Xerox Corporation, for example, adheres to this belief. The rationale is that employees would rather be by themselves, and feel intimidated by exercising with top corporate executives. The other school, naturally enough, favours a non-discriminating program.

Yet another trend, favoured by the Life of Georgia Insurance Company, makes entry into an exercise program a benefit just for those employees who are being promoted within the company.

Garneau -- Sounds like "the key to the executive washroom" syndrome.

Pawlenko -- Apparently, it has proven to be an incentive for employees within the company.

Garneau -- Of more immediate practical concern, how do I justify the implementation of a fitness program to our shareholders? It's quite likely they will feel their dollars are being wasted on a needless frill.

Seems to me their reaction will be similar to that of taxpayers if they were to learn of the existence of such a program at a government office. I can hear it now: "What! More dollars going to waste!" etc.

Pawlenko -- Far from it. Life of Georgia discussed the company fitness facility and programs with its stockholders. The stockholders' comments were most favourable, with the general reaction being that the fitness program would not unduly affect the bottom line. As a matter of fact, the stockholders thought just the opposite might occur!

And at the Emhart Company, a stockholder went on record as saying: "It's comforting to be a stockholder of a company that believes in positive attitudes and physical fitness!"

Other Issues

Many executives, even those with a positive personal commitment to physical fitness, need to be convinced that employee fitness is not just another fad.

Garneau -- To be frank, I've found most of your arguments in favour of a physical fitness program here at Macdonald & Garneau to be very persuasive. But, in all honesty, I must say I wonder if this interest in physical fitness is not just another here today, gone tomorrow passing fancy.

I can see us instituting such a plan. Everyone will buy sweatshirts and tights. We'll have an opening ceremony. At first, everyone will come - armed with high hopes and good intentions - but within a couple of months the whole thing will have fizzled.

I can see myself working out there with one or two other true fitness buffs, and that'll be it! Nice for us, but hardly worth the expenditure.

Pawlenko -- Sorry to disappoint you, but I think you'll find yourself having more company when you exercise than you expect.

The experience of a number of company fitness programs has been that as long as the employer provides *convenient* opportunity for exercise, a good cross-section of staff, <u>not</u> just the fitness buffs, will participate. Of course, the word to be stressed here is "convenient". Obviously, those employees who have not yet adopted exercise as part of their normal living routine will be swayed first by convenience.

Garneau -- I wish I could feel really sure about this. Frankly, the prospect of a lame-duck fitness program does not sit well with a company that prides itself on its dynamism. And if the news ever got around, as it surely would...

Pawlenko -- I really believe your fears are groundless. But to ensure they never materialize, there are some sound strategies you should employ to make sure your program's a success.

Garneau -- Such as?

Pawlenko -- Show that management really approves of the program. Have a fitness program advisory committee made up of both employees and management -- you can serve on it yourself. Make your employees feel Macdonald and Garneau is truly interested in their participation in what is really *their* program.

Garneau -- That sounds very admirable, but I still wonder if we couldn't ensure a higher and more consistent participation rate by paying our employees' membership dues in an outside private club. I'm pretty sure they'd be certain to participate, because they would now be members of clubs that would normally be beyond their means.

Pawlenko -- That may well be...for some of your employees. But I do believe that if your aim is to increase the physical well-being of as many of your employees as possible, you will accomplish this objective better through your own on-site facility. What's more, I'm sure you'll find that for what it costs you to pay these private membership dues, you could establish your own program and perhaps hire a good professional fitness advisor.

Garneau -- I thought a professional advisor was not a necessity?

Pawlenko -- Quite right. Volunteer instructors, providing they have some training, and continue to improve their skills, are quite adequate. But, obviously, if you do go ahead and secure a professional, I think you'll find, as have other companies, that a qualified professional can be one of the key factors in ensuring your program's success.

Garneau -- You know, I think what I want you to do is to convince me that our people really will be motivated enough to keep at a fitness program, no matter what type of program we provide.

Pawlenko -- Motivation is a very common concern. In fact, many companies, regardless of the type of exercise program they offer, will set a time limit on participation before remuneration.

Garneau -- What you're saying is that Macdonald and Garneau should only pay for an exercise program after an employee has shown he or she has the dedication to not only enroll, but continuously participate for, say, a year.

Pawlenko -- Right. And I think it's realistic to suppose that after attending exercise programs for this period, a routine will be established that will be hard for the employee to break.

But there are some less drastic motivational strategies that you can follow. Find out how the program's participants want to be motivated...

Garneau -- Are you trying to tell me people <u>want</u> to be motivated?

Pawlenko -- Oh, yes! Think of how many people embark on diets and fail just for want of a little extra motivation from a friend or spouse. Well, the same thing applies to a fitness program. Some participants will respond to motivation from their instructor, others to a friend, still others to peer group motivation.

Garneau -- I suppose if we go ahead, the first few months will tell all?

Pawlenko -- Actually, research has shown that the first six months of

a program are crucial.[18] But you can weather this period successfully, if your approach is right.

Encourage participants to keep their objectives realistic. This is where a good professsional is invaluable as a leader, for the leader can encourage the members to aim for overall general conditioning rather than, say, a dramatic weight loss, which is really just a by-product of the former state. A good leader can help a participant set immediate short-term goals that can be reached within a couple of weeks. Nothing aids a program like the participant's pride in accomplished objectives!

Garneau -- I gather the Pawlenko formula is good leadership plus sound planning plus convenience equals astounding success!

Pawlenko - I couldn't have said it better myself!

Lifestyle Considerations of Employee Fitness Programs

Many companies feel that offering exercise facilities and programs is, indeed, not their business. Corporate executives will often express the belief that if the company introduces such a program, it would be an infringement on the leisure time selection of the employees.

Garneau -- I've discussed our proposed program very fully with other members of the board. Some are quite enthusiastic. However, one of my colleagues is quite alarmed at the idea. He considers such a program to be a further instance of "Big Brother is watching you". As he sees it, Macdonald & Garneau would be forcing exercise into the life style of our employees, instead of allowing our employees to do what they want in ther leisure time.

Pawlenko -- I really have to disagree with this view. In actual fact, when a company provides an exercise facility and program it's really providing alternatives for leisure time selection.

Look at it this way. When Macdonald and Garneau offers an affordably priced exercise program, you are giving your employees the chance to participate in a fitness program, a chance that would be denied them owing to the exorbitant cost of joining a private fitness facility.

Garneau -- I think you misunderstand me. What I'm actually referring to is a whole philosophical perception companies have of themselves. I mean, such a program smacks of paternalism, and I don't think any company wants to think of itself in this light. What's more, I don't think Canadian workers will accept paternalism of this kind from a company.

Pawlenko -- Paternalism is perhaps not the best word to describe a company's involvement in exercise facilities and programming. I view

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18. Wanzel, 1974

such a program as an expression of the company's caring for an employee. Frankly, what's wrong with a company hoping that their employees will enjoy life to the fullest, as well as their involvement with the company through the work place? And, of course, the company in return gets to reap the dividends from healthier, happier employees. Seems like a fair exchange to me.

Garneau -- Oh, I won't quarrel with that.

But on a more practical note, it has occurred to me that there would, inadvertently, be some harmful effects to family life by the introduction of such a program.

Pawlenko -- In what way?

Garneau -- Well, you yourself have brought up the necessity of having a convenient facility so that participants don't have to spend additional time away from their families.

Pawlenko -- Life of Georgia, for example, has found that its exercise program has tended to bring families together more, rather than separating them. The reason for this is that families tend to become involved in an exercise program because of the involvement of a spouse at work.

It's almost as if a renewed enthusiasm for life from the working spouse involved in an exercise program enthuses the whole family.

Garneau -- I'll admit that since I took up exercise and jogging, our family activities have really centered more on energetic pursuits - my kids have taken up backpacking, we all cross-country ski, my wife and I are embarked on our own "discover-Toronto-on-foot" program.

Pawlenko -- Exactly. Incidentally, employee fitness programs have spawned a very interesting side benefit - the growth of retiree fitness programs.

Many companies allow their retirees to return to the company to use the exercise facility. This way, retirees keep up their contacts with friends at the work place and keep in shape. It seems that this type of involvement allows for a better transition from work to retirement...

Garneau -- And allows the company to keep a high profile with present staff, by showing that our interest in our people lasts beyond their productive period for the company.

Pawlenko -- Right. Everyone benefits.

Garneau -- My last concern is a purely dollars and cents one. None of our competitors offers this type of program, so why should we add to our costs by doing so? After all, a fitness program is not going to bring us additional contracts or more business.

Pawlenko -- Sure, you're concerned about your competition. But don't you want to be the best in your field?

Garneau -- What do you mean "Be the best...?" We <u>are</u> the best!

Pawlenko -- Well then, why do you just want to maintain the status quo? Surely, it's in your interest to introduce not only products and services, but also fringe benefits that demonstrate Macdonald and Garneau are Number 1?

Garneau -- Touché!

Pawlenko -- If I may be permitted a final last word or two...I'd say the only limit on what Macdonald and Garneau can do is the limit of its management imagination.

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Organization

ORGANIZATION SUPPORT FOR EMPLOYEE FITNESS PROGRAMS

Douglas S. Cowan

Douglas Cowan is President of Fitness Management Inc., a consulting company which is involved in designing and setting up ongoing employee fitness programs with many large and small corporations across Canada.

The operation methodology used by Fitness Management Inc. includes a five stage process of program development, involving elements of evaluation, design, planning, organization and set-up. The complete process offered by Fitness Management Inc. is described below, along with an outline of the many complexities that need to be considered when establishing an organization support system within a large corporate body.

Introduction

Organization structure and support of an employee fitness program are vital to its success. If the ongoing organizational structure of the operations aspect of the fitness program is poor, the program can be severly undermined.

Many employee fitness service agencies will find that an employer or an employee group is interested in establishing a fitness program almost immediately. Gratifying though this may be, the almost complete disregard for an organizational structure to facilitate the program's operation which so often accompanies this enthusiasm, spells trouble for the future. While it is not suggested that this active interest be squelched, it is important that the program's organizational structure be highlighted in the presentation of employee fitness to any employer or employee group. The rationale for this lies not only in the increased potential for the program's long-term success, but also in securing the employer's recognition of employee fitness as a serious, corporate venture.

Although we shall be examining the complexities that need to be considered when establishing an organization support system in a large corporate body, it should be understood that the components that exist in this relationship can be modified to suit the size and corporate structure of individual clients.

Elements of the Fitness Program

Before considering the topic of organizational support to employee fitness, let us look in some depth at the various elements of a successful on-site fitness program. With this framework, we are then able to

plan the fitness program within the corporate organizational structure, thus maximizing the necessary support of that structure for the employee fitness program. (Fitness Management Inc.'s "21 Principles for a Successful Fitness Program" is contained in the Appendix.)

In discussing the concept of an employee fitness program with a client, the representative of the employee fitness agency should present a comprehensive approach to employee fitness. Whether this comprehensive approach is referred to as holistic, lifestyle, wellness or preventive health orientation will depend on who you are talking to. What is important is that you offer the client a service that will incorporate the following 12 steps.

1. Initial marketing research. (Consider the company's employees as the potential market.)

2. The establishment of an initial Fitness Advisory Committee.

3. The development of an extensive Program Design phase, utilizing the information and resources derived from steps 1 and 2.

4. The preparation of a facility with appropriate equipment as determined in the Program Design phase.

5. The employment of a Fitness Director, or Advisor at least three to four months prior to the anticipated opening of the fitness facilities.

6. A soundly focused, well planned program, the basic components of which are promotion, education, physical fitness evaluation, supervised exercise, opportunities for spin-off club activities and lifestyle transition. (Bear in mind also that while your program should allow for the supervision of separate male and female exercise groups, the fitness needs of individuals, groups with special problems, combined male and female groups, not to mention those who prefer self-supervised exercise, should also be considered and planned for.)

7. The provision for an initial period of professional exercise leadership, say four months.

8. The training of volunteer leaders for ongoing programs.

9. Provisions for continual participant evaluation.

10. The use of the employee fitness program as a public relations vehicle.

11. The development of a strong, ongoing Fitness Committee.

12. Attempt to incorporate the employee fitness program into the on-

going programming and value system of the company by ensuring its full acceptance by Management, Personnel, Public Relations, the Medical Department and the appropriate Union officials. If these criteria are met, the groundwork has been well laid for attaining organizational support for the fitness program.

Organizational Support

When we talk about organizational support for an employee fitness program we are referring to the overall placement of the program within the organizational structure of the company. The position accorded the program will be influenced by subtle variables, for example, the relationships which the program establishes with other departments in the company and with outside agencies in the community. The structure and functions of the Fitness Committee as perceived by the organization will also affect the program's placement within the company, as will the job description and qualifications of the program's Fitness Director. Another important variable is the legal posture of the company vis-à-vis the fitness program. However, important though all these variables are, they are secondary to Management's perceptions of the organizational integrity of the program itself.

Unless you can demonstrate that the fitness program you are proposing is operant on certain clearly defined goals and objectives, it will not be accorded the credibility so essential for organizational support.

The following paradigm illustrates the developmental stages of a well-conceived employee fitness program.

	COMPANY ACTIVITY	CONSULTANT INVOLVEMENT
Stage I	Gestation Period (1 month to 2 years)	
	. Usually middle or senior Personnel Manager attempts to sell the concept to the company executives.	. Advisory. . Negotiation role.
	. An interim Fitness Advisory Committee (F.A.C.) may be formed.	. Usually no contract.
	. F.A.C. struggles to define itself and ponders how to go about establishing an employee fitness program.	
	. F.A.C. may get in touch with the Employee Fitness Consultant from the Ontario Government.	

	COMPANY ACTIVITY	CONSULTANT INVOLVEMENT
Stage 2	Program Research (2 to 3 months)	
	• Company employees are surveyed to determine the degree of interest in fitness and the type of programming that is advisable.	• Feasibility Study contract.
	• Existing company facilities are researched.	• Training of the Fitness Advisory Committee.
	• Community opportunities are assessed.	• Responsible to the Chairman, F.A.C.
	• Recommendations are made to the company Management as to whether to proceed or not.	*Product:* A Feasibility Study
Stage 3	Program Planning (3 to 6 months)	
	• If the results of the Feasibility Study are positive and Management approves, program planning is required, *i.e.:*	• Program Design contract.
	(1) Facility design - architect drawings, floor plan and equipment layout, costing	• Team Building within Fitness Committee.
	(2) Operational Cash Flow analysis (3) Financial alternatives (4) Program scheduling (5) Organizational analysis (6) Objective setting (7) Job specifications (8) Structure (9) Establish company's legal liability	• Responsible to the Chairperson. • Attending Fitness Committee meetings.
	• Interim Fitness Advisory Committe becomes a Fitness Committee, *i.e.* it becomes more formally structured.	*Product:* A Plan
Stage 4	Program Organization (3 to 6 months)	
	• Professional Fitness Director acquired.	• Assist in hiring, orientation, develment of Fitness Director.
	• Training of part-time exercise class leaders.	

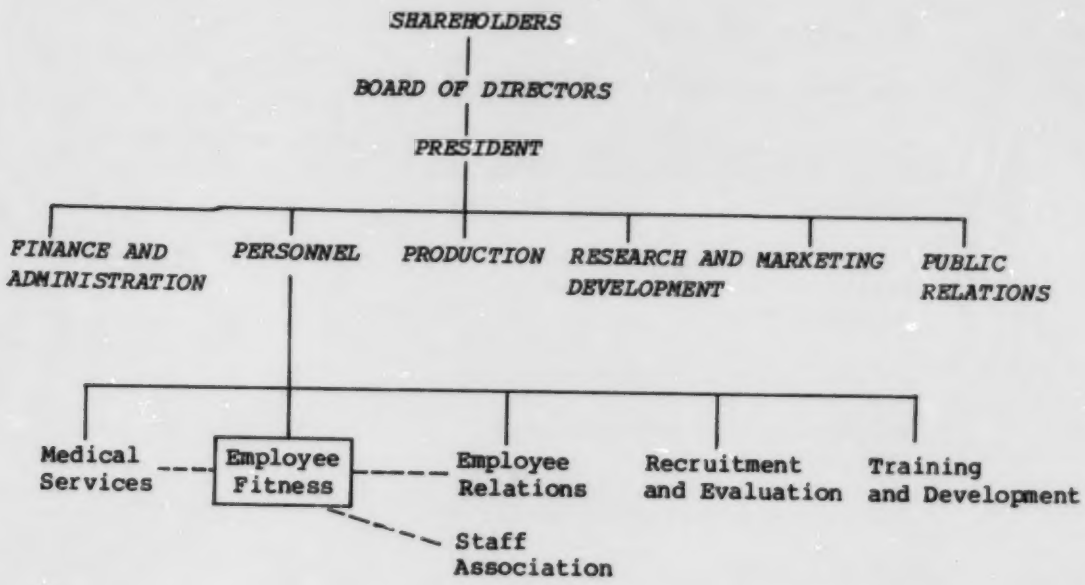
	COMPANY ACTIVITY	CONSULTANT INVOLVEMENT
Stage 4 cont'd.)	. Facility completed.	
	. Equipment purchased and installed.)	
	. Financial negotiations.)	. Consultative assist-
	. Relationships established with the) community.)	ance on all items.
	. Establish resource library.	*Product:* A Prototype
	. Promotion Campaign: focus "Awareness".	
	.Initital fitness evaluations.	
	. Preparation for pilot program (optional).	
	. Program policies and procedures.	
	. Evaluation mechanisms established.	
Stage 5	Program Operation (1 year)	
	. Pilot program run (optional).	. Advisory
	. Volunteer leaders trained and selected.	
	. On-going promotion and evaluation.	. Direct assistance contract.
	. Educational programs.	
	. Evaluation of more diversified programming.	*Product:* A Pilot Program Report (optional)
	. Budgeting.	
	. Reporting	

After one year the company may wish to diversify its programming into lifestyle transition programs.

The Employee Fitness Program Within the Organizational Structure

Given the foregoing principles of organization integrity, let us now accord the employee fitness program its appropriate place within the company structure.

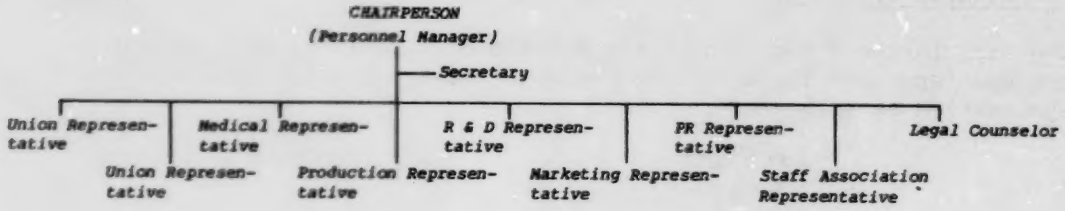
Figure 1 illustrates a typical organizational structure. Note the placement of the fitness program within this structure.



What important signals regarding the employee fitness program can be discerned from this particular type of organizational placement?

First, it proves that Employee Fitness is recognized within the company as an important program. Second, from this structural placement the Directors of both Medical Services and Employee Relations can be approached from a position of organization equality. Third, the Employee Fitness Director reports directly to the Vice-President or Personnel Manager. This allows direct access to a member of Senior Management. Finally, this position ensures the Fitness Director, and, indeed, the program itself, of the esteem of all company employees.

Of course, as we observed in the earlier paradigm showing the developmental stages of an employee fitness program, from the gestation period onward, the program has been so structured along recognizable organizational lines that its position within the corporate structure is no surprise. This early preparation is quite in evidence, for example, in Figure 2, which illustrates the structure of the Fitness Advisory Committee (F.A.C.). (F.A.C. was an interim structure set up for the purpose of working through Stages 1 and 2 of the program's development.)



There are some important structural principles underlying the composition of the Fitness Advisory Committee, namely:

1. The Chairperson should have direct access to the President.
2. Each major department or division of the company should be represented on F.A.C.
3. There should be proportionate representation by men and women.
4. There should be proportionate representation by age category.
5. There should be balanced representation from fitness advocates and fitness neutrals.

The mandate and functions of the Fitness Advisory Committee also reflect a knowledge and awareness of the procedural dictates of the corporate decision-making process. Like any other advisory committee, it is F.A.C.'s function to provide background information as required by the Employee Fitness Agency, as well as providing ongoing reference and points of contact with the Agency. The administration, circulation, recovery, and in some cases, collation of the questionnaire designed by the Agency is also one of the functions of the F.A.C. The Committee has the mandate to participate in the Feasibility Study interviewing process and is aware of the information and work being done to properly evaluate this project. The completed Feasibility Study is received by F.A.C., as it is the Committee's function to make recommendations based on the Study to the company.

The establishment of a philosophical base for future program decisions, as well as the promotion of a feeling of personal involvement in F.A.C.'s ongoing work, especially as it evolves through the program stages, are also important functions of the Committee.

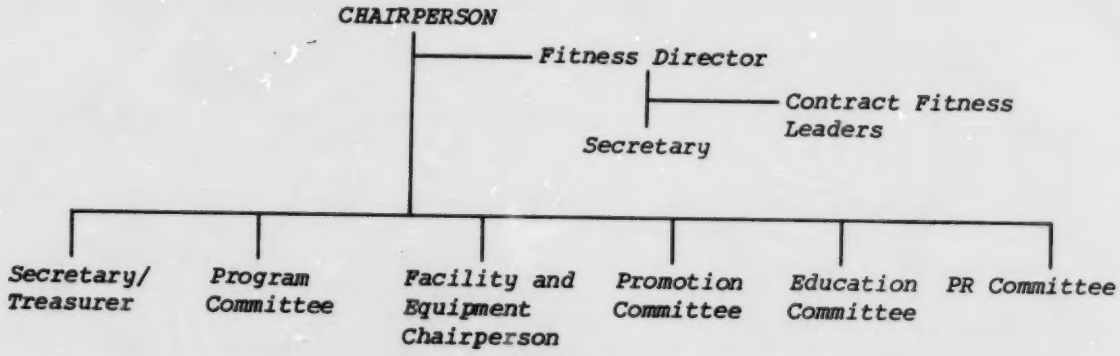
The Fitness Committee

The structure and function of the Fitness Committee, as they pertain to the developmental stages of the employee fitness program, could be synthesized as follows:

	FUNCTION	STRUCTURE
Stages 1 & 2	Advisory	Representative
*Stage 3**	Transition	Transition
Stages 4 & 5	Program support	Functional/Representative

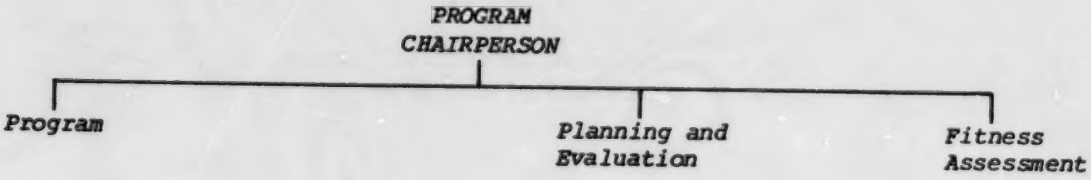
**There may be some personnel changes in the Fitness Committee as it evolves from its advisory role to one of providing more program support at the end of Stage 3.*

It is obvious that during Stage 3, and certainly by Stage 4, of development the Fitness Committee will need to solidify its internal structure and begin to channel its functions into operational policies and procedures. A structural paradigm for the Fitness Committee is shown in Figure 3.



Let us examine the Fitness Committee more closely by looking in turn at three of its subcommittees - the Program Committee, the Promotion Committee and the Public Relations Committee.

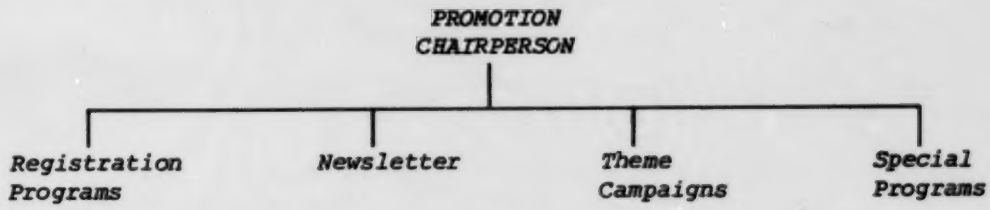
The Program Committee



The Chairperson of the Program Committee is responsible for liaison with the Staff Association and for the co-ordination of all program development, with the assistance of the Fitness Director. The Chairperson also works closely with his or her counterpart in the other program subcommittees.

The Program Committee responds to the demand for club activities, co-ordinates these with the Staff Association, if applicable, and develops special-needs programs in conjunction with the Fitness Director. Evaluations of all the fitness programs are included in the Committee's mandate as well as responsibility for assessing participation patterns, and recommending changes in programming and scheduling. Further functions of the Program Committee include the conducting of continual/seasonal-need assessments of company employees in order to make appropriate program adjustments, assisting in the provision of physical fitness assessments, and ensuring the design of extension programs for employees whose work deployment takes them on the road.

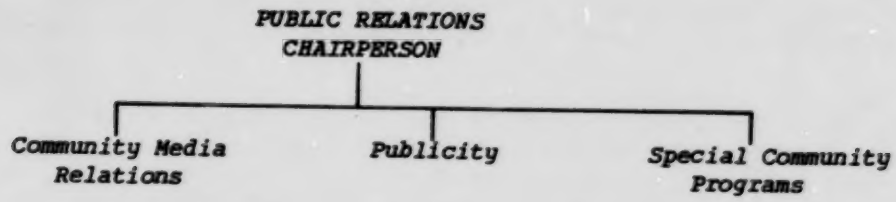
The Promotion Committee



All program promotion is co-ordinated by the Promotion Committee Chairperson, with assistance from the Fitness Director. As the well-being of the program relies on the Promotion, Program, and Public Relations Committees working well together, the Chairperson of each Committee will strive closely with the others to ensure harmony and co-operation.

The Promotion Committee itself works on registration/membership campaigns. The Committee also provides fitness articles for the company newsletter, and develops special theme campaigns. Working with the Public Relations Committee, the Promotion Committee contributes publicity for special programs. Along with the Program Committee, Promotion establishes appropriate awards and incentive programs. Finally, this Committee will develop items of a promotional nature, e.g., logos, T-shirts, scarves, hats, towels, gym bags, etc.

The Public Relations Committee



The Public Relations Chairperson, together with the Fitness Director, represents the Employee Fitness Program to the public. The Public Relations Chairperson also confers regularly with his/her opposite number in the Program and Promotion Committees.

The Public Relations Committee prepares news releases for the local newspapers, holds press conferences, and stages special community fitness programs in conjunction with community agencies. The Public Relations Committee works with the Facilities Committee to ensure proper displays and signs, and with the Program Committee to develop appropriate community access policies. By maintaining a proper photographic record of the fitness facilities and programs, and by relating to local TV and radio stations, the Public Relations Committee ensures that the program maintains a high media profile.

In all these activities of the Fitness Committee, the pivotal force has been the Fitness Director. In light of the importance of the Fitness Director to the success of the program, it is timely to consider the qualities of a good Fitness Director, and to detail the Fitness Director's responsibilities.

The Fitness Director

Qualifications

A candidate for the position of Fitness Director should be a University graduate of Kinesiology, or of an equivalent program with specialization in physical fitness.

Ideally, a candidate should have previous work experience in leading fitness groups in an industrial or commercial setting. Experience in fitness evaluation and community activities would also be an asset.

The hallmark of a good Fitness Director is the creative ability to organize and lead activities. In addition, the Fitness Director should be personable, with a physical appearance that is consistent with health and fitness.

All these attributes are ancillary to the essential knowledge and training that the Fitness Director must bring to the job. The Fitness Director must be a mature individual possessing the ability to:

(a) carry out fitness evaluations and interpret the results;
(b) organize, schedule and lead fitness classes;
(c) prescribe individual fitness and activity requirements;
(d) perform cardio-pulmonary resuscitation;
(e) understand the cardiovascular system and the effects of variables such as age, sex, and lifestyle on the development and maintenance of physical and mental fitness; and
(f) undertake and oversee an extensive promotional/motiviational campaign.

Responsibilities

The Fitness Director's overall responsibilities for the employee fitness program include not only program supervision, but also the co-ordination and execution of all the program activities as designated by the Fitness Committee.

The following Fitness Director's checklist provides a breakdown of the specific responsibilities that comprise the Fitness Director's accountability for the safety and success of the program.

- Organize, schedule and co-ordinate all fitness-related activities and programs, including fitness evaluation, counselling, and male, female, and co-ed programs.
- Evaluate the fitness-related programs through questionnaires and statistical data.
- Co-ordinate the selection and training of in-house volunteer leaders.
- Select, schedule, monitor and evaluate any contract program leaders.
- Initiate and co-ordinate all aspects of a promotion/motivation campaign.
- Develop promotional materials.
- Provide supervision and guidance regarding usage of the fitness activity areas.
- Recommend the selection and purchase of any fitness-related equipment.
- Provide technical information and recommendations to the Fitness Committee.

- Liaise with company Management and Health Services.
- Liaise with company legal counsel to ensure proper liability coverage.
- Co-ordinate the development of the fitness budget and monitor the expenditure of funds from within that budget.
- Develop and maintain a library of resource and reference materials for distribution to program participants, and for general reference.
- Develop a fitness eduction program.
- Develop and maintain relationships conducive to the exchange of program information resources with community agencies.
- Provide a regular flow of community information to participants.
- Maintain regular written and verbal communications with all company employees.

All of the items on the Fitness Director's checklist are vital to the effectiveness of the program, however, one item, legal liability, warrants specific consideration.

Legal Liability

In the process of completing the Program Planning stage of developing an employee fitness program, the company should establish its position on legal liability for the proposed program.

As the representative of the employee fitness agency, you should facilitiate the consideration of this concern by posing a series of questions.

The questions presented below are those which Fitness Management Inc. always poses to its clients. The answers provided are a sample of one company's responses. It is important to stress, however, that each company has its own policies and needs pertaining to this matter. As a result, all companies will treat the subject differently.

Reliance on a legal model is not advised. The onus is on you, the consultant, to formulate and ask the right questions so that your client may fully understand and explore the subject of legal liability as it concerns the company's particular situation.

Question - Do you see the fitness program as an extension of the present company liability program?

Answer - As owner and occupier of the fitness facility, the company will be liable for the condition of that facility and should adequately plan liability coverage. An owner-occupier, in our opinion, owes a duty to those permitted or invited on the premises to provide a safe place to carry on the activity and to guard against dangerous conditions that it knows of or should reasonably know of.

To carry out its responsibility, the company will want to do periodic inspections and testing of the premises and equipment. We should also take all reasonable security measures, e.g., locks, controlled entry, age limits for users, instruction sessions for users, supervision of facilities. Only our maintenance staff is covered by Workmen's Compensation.

Question - Will your present insurance policy cover program activities, or will you need to pay more for the necessary coverage?

Answer - At present, all company premises (Head Office and branch offices) are covered in one comprehensive liability policy. Our coverage for liability as an employer is (a) $5,000,000 for each person, and (b) $5,000,000 for each occurence or accident. Our coverage provides for injuries arising out of and in the course of employment of the (injured) person by the company. Our coverage for liability as a property owner is for $5,000,000 for each accident or occurrence.

Each year the company must inform the insurer of the hazards to be covered - the details of all the properties - and the premium is based on the nature of these hazards. A greater underwriting risk entails a greater premium.

While personal injury awards are not as high in Canada as in the U.S., they are very gradually creeping nearer the $1,000,000 mark, due to the rising costs of medical care, and loss-of-income considerations, expecially for the young person with a long life expectancy. No doubt our coverage will keep pace with this trend, and with inflation, but at an increasing premium cost. Contact with the company department handling our insurance matters will be necessary before we can adequately answer this question.

Question - Do you feel the Fitness Advisory Committee should be incorporated from a liability point of view?

Answer - Incorporation of such a committee would not serve any purpose. As Committee members would be company employees, and as the company is the owner and occupier of the premises and facilities, the company would be the party ultimately responsible for the actions or omissions of the Committee.

Question - Do you see the use of waiver forms and releases prior to participant involvement?

Answer - I see request of a waiver before use of the facility as giving some security to the company and as a visible reminder to users to take care. However, the company should not put total reliance on such waivers. Courts have refused to give effect to such releases and waivers where they felt that the signor could not be held to have contemplated the negligence or intentional damage that occurred. Our main area of concern is the condition of the facilities. So that users do not present a hazard to themselves, and to other users, medical authorization should really be obtained in advance.

Users will be expected to use reasonable good sense in using the facilities and in exerting themselves.

You should also note that the company, as employer, will bear the responsibility for injuries caused by employees while acting within the scope of their employment. This applies to fitness advisors, equipment supervisors, and persons doing fitness testing.

Question - What other potential liability aspects, insurance requirements and safety procedures should be considered prior to program start-up?

Answer - We would expect you to:

1. consult with the company department responsible for maintaining our insurance coverage concerning coverage for the fitness facility;

2. consider the need for supervision of the facility during its operation;

3. provide for inspection and repair of the premises and of the equipment;

4. provide education for equipment use;

5. provide warnings, and rules for places and things that could cause injury if not handled seriously; and

6. encourage, or make mandatory, medical check-ups and authorizations, and the general release (waiver) form.

Question - What will the company's position be regarding liability for part-time temporary employees; family of employees; friends; pensioners?

Answer - The company considers there is a high duty incumbent on us

to provide a safe workplace for our employees. If the premises are not part of the actual workplace, but are premises to which persons are invited, the company acknowledges that a common duty to all persons who are permitted to enter (*i.e.*, excluding trespassers) will be owed. The category (*i.e.*, part-time vs. full-time employee) will not modify the duty.

Summary

It has been demonstrated that ongoing organizational support for the employee fitness program is an essential ingredient in ensuring the viability of such a program. Without it, even the best conceived programs are liable to falter once the initital spark of enthusiasm has subsided.

APPENDIX

21 Principles for a Successful Fitness Program

1. Fun
2. Strong leadership
3. Management support (enlisting personal and financial commitment from company executives)
4. Accessibility (providing on site or nearby facilities)
5. Availability (implementing the right programs at the right times)
6. Continual assessment (evaluating levels of fitness and performance achievements)
7. Recording (monitoring progress of participants)
8. Group exercise opportunities
9. Challenging physical programs
10. Continual motivation of participants
11. Administration (attending to details and mechanics of program operation)
12. Continual promotion within the company
13. Individualization (setting up individualized exercise counselling)
14. Diversification of programming
15. Flexibility (listening to program feedback from all participants)
16. Extension (incorporating travelling employees)
17. Integration (supporting the values, policies and public relations of the company)
18. Continuity (supporting other company and community organizations)
19. Co-ordination (complementing company programs in the areas of Marketing, Public Relations, Personnel, Medical Care, Recreation or Staff Association, and Management)
20. Organizational integrity (keeping within the company structure)
21. Fun

Awareness

FITNESS AWARENESS PROGRAMMING

Veronica Marsden

Veronica Marsden is a private Employee Fitness Consultant in Toronto. With a background in Kinanthropology from the University of Ottawa, she has been involved for many years in physical fitness, and has been a key figure in the Canada Life Assurance Company's Employee Fitness Program. The Canada Life Assurance program was a part of a research project developed by Recreation Canada to observe the benefits of employee fitness programming. As the Co-ordinator of all aspects of fitness programming at Canada Life, Ms. Marsden's contribution included extensive fitness awareness programming along with exercise classes in the morning, at noon and after work for approximately 40% of Canada Life's over 1,500 employees.

The highly successful program at Canada Life is testimony to Ms. Marsden's expertise in fitness awareness programming.

Introduction

Fitness awareness programming is an essential part of the operation of an employee fitness program. Unfortunately, it has often been neglected, with resultant negative consequences. It is vital, therefore, that fitness awareness programming be an integral part of the ongoing promotion of physical fitness at the worksite.

Many companies in Ontario have initiated fitness awareness programming without providing any opportunity for worksite physical activity. This type of operation does constitute an employee fitness program. Under these conditions, a complete fitness awareness program would also include the promotion of activity opportunities in the community where the worksite is located.

Numerous companies across Ontario have recognized the need for assistance in fitness awareness programming. Both employers and employees have expressed the desire to receive and distribute information that will aid all company personnel to become more aware of fitness, and more motivated to improve their own fitness level.

Many potential resource sources including materials, human resources and systems that exist at the worksite are listed below. While this resource list in in no way complete, an employee fitness services agency that can identify and acquire these resources will have laid the groundwork for offering a successful fitness awareness program. Such a program can educate and motivate the employee to become active at home, in the community and, ideally, at the worksite.

Material Resources

Before embarking on a fitness awareness campaign, it is advisable to identify the existing resources, both human and material. Many resources, available at little or no cost, can be instrumental in creating an awareness of fitness and personal lifestyle habits. The following section will deal with organizations in North America that offer valuable health education materials for the layperson. Wherever possible, addresses, phone numbers and cost of materials are included.

1. Addiction Research Foundation of Ontario
   33 Russell Street
   Toronto, Ontario
   M5S 2S1
   416-595-6100

All pamphlets on alcohol and drug abuse are available free to Ontario residents. Many films on these topics are available on a free loan basis.

2. American Heart Association
   7320 Greenville Avenue
   Dallas, Texas 75231
   U.S.A.

All health education material available at low cost.

3. Canadian Dairy Foods Services Bureau
   20 Holly Street
   Toronto, Ontario
   M4S 2E6
   416-485-4453

Colourful nutrition posters, teaching aids and pamphlets available at low cost to consumers.

4. Canadian Starch Company Limited
   1 Place du Commerce
   Nun's Island
   Montreal, Quebec
   H3E 1A7

An excellent pamphlet entitled "Exercise ... Your Heart Depends On It" is available free in quantities up to 12. Additional copies are 50¢ each.

5. Cereal Institute, Inc.
   135 South La Salle Street
   Chicago, Illinois 60603
   U.S.A.

A colourful poster entitled "Nutrients and Food for Health" is available free of charge. You can also write for a publications list.

6. Chicago Heart Association
   22 West Madison Street
   Chicago, Illinois 60602
   U.S.A.

A charge is made for most educational materials, however, single copies are available free.

7. Fitness Finders
   Spring Arbour,
   M.I. 49283
   U.S.A.

Their calorie counter slide rulers are very popular. They include caloric expenditure with daily activities, and various sporting activities are adjusted for body weight. The cost varies with quantity ordered.

8. Food and Nutrition Foundation
   U.S. Department of Agriculture
   500 12th Street South West
   Washington, D.C. 20250
   U.S.A.

An attractive poster entitled "Nutrients and Food for Health" is available free of charge. You can write for a complete list of publications.

9. General Foods
   P. O. Box 4019
   Terminal 'A'
   Toronto, Ontario
   M5W 1J6
   416-481-4211

Most nutrition education materials, both pamphlets and posters, are available free of charge with a maximum order of 20 copies.

10. Gordon Watts Films
    4049 Sheppard Avenue East
    Agincourt, Ontario
    M1S 1S8
    416-291-9321

The film "For Tomorrow We Shall Diet" is available for rental at cost.

11. International Tele-Film Enterprises Ltd.
    47 Densley Avenue
    Toronto, Ontario
    M6M 5A8
    416-241-4483

This company offers the "Project Health" series of films and other audio-visual resources at cost.

12. **Kellogg Salada Canada Limited**
Home Economics Services
6700 Finch Avenue West
Rexdale, Ontario
M9W 5P2

A wide variety of educational and recipe booklets are free of charge and available in English and French. Audio-visual aids are also available.

13. **Ministry of Culture and Recreation**
Fitness Services Unit
77 Bloor Street West, 8th Floor
Toronto, Ontario
M7A 2R9
416-965-6312

Thirteen fitness films are available on a free loan basis from the provincial government. Contact your local regional branch of the Ministry of Culture and Recreation for film bookings. You can also write to the Ministry of Culture and Recreation for a list of their free fitness educational pamphlets and other resources.

14. **Ministry of Energy, Mines and Resources**
Consumer Services Division
Fisheries and Marine Services
Environment Canada
Ottawa, Ontario
K1A 0H3
613-998-8724

The booklet "Seafood Recipes for Calorie Counters" is available in bulk, free of charge.

15. **National Car Rental Systems Incorporated**
Advertising and Public Relations
5501 Green Valley Drive
Minneapolis, Mn. 55437
U.S.A.

A booklet on jogging techniques entitled "One Step at a Time" is available in bulk, free of charge, while supplies last.

16. **National Department of Health and Welfare**
Fitness and Amateur Sport Branch
365 Laurier Avenue West
Journal Towers Building
Ottawa, Ontario
K1A 0X6
613-996-4510

The poster series "Fitness is ...", is available in both French and English, free of charge. Also available free are bilingual pamphlets including:

"Health and Fitness"
"Lunch on the Run"
"Physical Activity and Weight Control"
"Aerobic Fitness"
"You and Your Heartrate"
"Exercise at the Office"

17. National Film Board

Several fitness and health education films are available on free loan from the N.F.B. You can contact your local office for a catalogue.

18. Nutrition Link
P. O. Box 504
Port Credit
Mississauga, Ontario
L5G 4M2

This private organization has developed a serioes of 15 minute nutrition education slide-tapes.

19. Ontario Blue Cross Association
150 Ferrand Drive
Don Mills, Ontario
M3C 1H6
416-429-2661

The following booklets are available to selected organizations, free of charge:

"Stress"
"Food and Fitness"
"Help Yourself"

The price for large orders is 25¢ per booklet.

20. Ontario Heart Foundation
310 Davenport Road
Toronto, Ontario
M5R 3R2
416-962-3600

All materials are available in bulk, free of charge. You can write for a publications list.

21. Ontario Milk Marketing Board
50 Maitland Street
Toronto 5, Ontario
416-920-2700

A series of four milk posters are available free of charge. These posters illustrate the themes "Wear a Moustache" and "It Tastes So Good".

22. Ontario Ministry of Health
Communications Branch
9th Floor
Hepburn Block
Queen's Park, Ontario
M7A 1S2
416-965-3101

You can write for free copies of "The Canada Food Guide", and their publications list which comprises over 70 health education pamphlets.

23. Operation Lifestyle
Information Directory
Brooke Claxton Building
Tunney's Pasture
Ottawa, Ontario
K1A 0K9

The booklets "Operation Lifestyle" and "Ways to Improve Your Lifestyle" are handy guides to help people assess their risk factors. They are available in bulk, free of charge.

24. Oregon State Health Division
MCH - Dental Health Services
P. O. Box 231
Portland, Oregon 97207
U.S.A.

A very informative and colourful pamphlet on snacks is available free, in limited quantities.

25. Participaction
80 Richmond Street West
Suite 805
Toronto, Ontario
M5H 2A4
416-361-0514

A new series of six fitness posters plus the booklets "Surprising ... What You Don't Know About Fitness" and "Physical Fitness, Who Needs It?" are available at cost. Participaction has also just developed a fitness awareness campaign. Proofs of these slogans are available free. Other resources may also be available.

26. Promotion and Prevention Directorate
Health Services and Promotion Branch
Department of National Health and Welfare
365 Laurier Avenue West
Journal Towers Building
Ottawa, Ontario
K1A 0X6

You can write for a free copy of the resource publication entitled "Health Education".

27. Public Library

Check your public library for fitness and health education films that are available locally.

28. Standard Brands Limited
1 Dundas Street West
Toronto, Ontario
M5G 2A9
416-598-2600

The following nutrition education materials are available at cost:

"Family Fitness Also Means Sensible Eating" (poster - 30¢ each).
"Dietary Control of Cholesterol" (recipe booklet - 40¢ each).
"Family Fitness" (booklet - 15¢ each)
"Sodium Restricted Diets" (recipe booklet - 40¢ each)
"Your Heart and How to Live with It" (booklet - 40¢ each).
"Cholesterol, Calorie and Sodium" (slide ruler).
Computer Cards - .25¢ each.

29. Sun Life Assurance Company of Canada
Corporate Relations Department
P. O. Box 6075
Montreal, Quebec
H3C 3G5

The following booklets are available in bulk:

"Cross-country Skiing"
"Walking"
"Hiking"
"Rowing"

30. Swebel Printing
P. O. Box 433
1408 Walnut Street
Murphysboro, Illinois 62966
U.S.A.
618-684-3911

Excellent conditioning booklets for fitness and all sports are available. Order in bulk for cheaper cost. Each booklet contains a complete exercise program (illustrated with stick figure drawings) including strength exercises for the whole body, flexibility exercises, and cardiovascular exercises.

Human Resources

In addition to identifying the wide range of free and economical tools available to an employee fitness program, it is equally important to seek out the many human resources which might be instrumental to the success of an awareness campaign. The following is a list of human resources whose support and expertise should be sought wherever possible.

Medical and Occupational Health Staff

By actively participating in fitness classes, company physicians and nurses not only give the program a "medical seal of approval" but provide a good example for others. If a company has an occupational health unit it is important to include a representative on your fitness advisory committee.

Doctors and nurses can also play a supportive role in the operation of remedial type programs, individual and group health counselling, and stress testing. Medical staff might also be approached to contribute articles to the company fitness newsletter.

Cafeteria Staff

Many companies now hire a registered dietician whose major responsibility lies in meal planning. In companies where this type of resource exists, co-operation should be sought in the running of obesity programs, group and individual diet counselling, and nutrition awareness campaigns centered in the cafeteria. The company nutritional expert could also be approached to contribute a regular column in the fitness newsletter.

Promotional or Advertising Departments

Larger companies with a promotional or advertising department usually have at least one artist on staff whose expertise can add a professional touch to your program. One of the first tasks to be tackled that requires artistic talent is the designing of a company fitness logo. If a professional artist is not available, sponsoring a company wide contest will usually produce a suitable logo which can be imprinted on T-shirts, gym bags, sweat suits, letterhead, etc.

The in-house services of a promotional department in developing exercise charts, doing layout work for newsletters and bulletins etc. can add a professional touch to program materials and cut down on the cost of getting work done on the outside.

Photographers

Any employee group usually has several semi-professional photographers whose talents can be used in promoting your program. A display of class pictures, "before and after" shots and "employee of the month" photos will do much to increase interest and invite the curiosity of non-participants.

Interested Employees and Miscellaneous Talents

In setting up "special interest" classes such as disco dancing, judo or yoga, the programmer should first look within the company for potential instructors with expertise in this area before hiring an outsider. Usually employees are very willing to volunteer their time and expertise.

Employees should also be recruited for such tasks as helping out at registration, assisting in special events etc. It should be clarified at the onset of the program that it is "their program" and its success depend on everyone's co-operation and support.

Fitness Advisory Committee

A well chosen fitness advisory committee can be the key to success with programs of any size. In many cases it may be the determining factor in the support of the program by the workers. The Fitness Advisory Committee should be a small group that incudes the Fitness Consultant, the Director of Personnel or Senior Personnel Officer, a representative from the Occupational Health Unit (where one exists), the Building or Facilities Manager, and a respresentative from the Recreation Association or other employee-based group. Functions of this committee should include

(a) approving major budget expenditures;
(b) making recommendations for program changes;
(c) ensuring a quality program;
(d) providing a liaison between the fitness co-ordinator and senior management, as well as between the fitness co-ordinator and the employees.

The fitness advisory committee should meet at least once a month in order to be on top of program happenings, as well as to ensure a regular feedback network of communication.

Identification of Media or Communications Methodolgies at the Worksite

Fitness Newsletter

Where adequate financial support is available, a regular (*i.e.*, monthly) fitness newsletter distributed company wide is the most successful means of mass communication. Newsletters provide an ideal methodology through which to make employees aware of various lifestyle habits detrimental to general health and well-being.

One of the best ways to generate an interest and awareness of fitness and personal lifestyle habits is to establish monthly themes - for example, January might be nutrition month - with special speakers, films and discussion groups centering around the designated topic. The emphasis on this one topic might also carry over into the newsletter, which would carry a feature article on "Exercise and Weight Control" or "Fad Diets".

Other items which might be included in a company paper to generate a greater interest, not only in personal lifestyle habits, but in the program are:

1. Home exercises.
2. Low-calorie recipes.
3. Fitness jokes.
4. Announcements of upcoming events, outings etc.
5. Participation "awareness" slogans.
6. Milestones that program participants have accomplished, *i.e.*, kilometers run, weight lost etc.
7. Welcome to new fitness class members.
8. Details of new fitness pamphlets.

Regular Company Newspaper

Where either the human or financial resources are inadequate to publish a regular fitness newsletter, articles on fitness and health related topics can usually be plugged into an already existing company paper. As a matter of fact most company newspaper editors welcome regular contributions of material which is of high interest to most people.

Even if a regular fitness newsletter is published, additional articles, low-calorie recipes etc. might be included in the regular company newspaper in order to reach as many workers as possible.

Bulletins

Special one-page flyers on colourful program letterhead are inexpensive but effective in promoting certain events. They can usually be printed in-house or at an outside quick-printer at low cost.

Bulletin Boards

Recent articles on fitness and health related topics, human interest stories, cartoons, special announcements, etc. should be tacked up on bulletin boards. Both free standing and wall bulletin boards should be strategically placed at heavily populated areas of the company in order that newsworthy items get maximum visibility. Confining fitness posters, slogans and articles to the exercise area means that they will only be viewed by the already converted, rather than the whole company. Heavily travelled areas of a company which would also be suitable areas to place bulletin boards are the cafeteria, the staff lounge, elevator areas, stairwells, and the washrooms.

If bulletin boards are strategically placed where people often have to line up (e.g. cafeteria) or wait (elevator areas) promotional materials can't help but be read and absorbed by many company personnel.

Scheduling Considerations of a Fitness Awareness Campaign

The main objective in a fitness awareness campaign is to attract the attention of all employees and make them realize that fitness is not just for "everyone but me." Many people still think along the lines of fitness as being simply a "disease free" state or the absence of obesity.

The participation slogans and posters are invaluable tools for alerting people to the fact that they are not as fit as they think they are, or should be. Ideally, this type of promotional work should commence approximately two months prior to the launching of an on-going program. Often, people must read a sign or poster message several times before they realize they are being spoken to.

According to the Marketing Continuum, outlined by Participaction, the next step is to instill attitudinal change or educate the consumer on the components of fitness, proper exercise techniques, etc. This can be done through the distribution of pamphlets, audio-visual presentations and displays.

A couple of weeks before classes are slated to begin, a special fitness week with noon-hour and after work activities will help sell your product. Promotion events might include:

1. A session entitled "Meet Your Fitness Staff". The session should be be followed by a question and answer period on the plans for the program.

2. Showing a film on fitness. Both "Feelin' Great" and "The Good Life" are suitable, as they appeal to general audiences.

3. Staging a fitness assessment station where people can measure their flexibility, strength, stamina etc. (If pre-program testing is being done, this type of set-up might not have the same impact.)

4. Establishing nutrition counselling booths where people may have their dietary patterns assessed. (Either company occupational health staff or dietetic students could be called upon to assist in this type of workshop.)

5. Putting on a demonstration fitness class.

6. Inviting a guest speaker to talk on the benefits of fitness at the workplace.

7. Mounting a display of suitable exercise clothing for men and women.

Pamphlets handed out during the initial stages of an awareness campaign should be very general in nature. A good booklet to hand out during fitness week might be "Health and Fitness" by P. O. Astrand, available through the National Department of Health and Welfare. Educational materials on specific and more complex topics, such as heart disease, weight control, smoking etc., should be saved until a later stage. It has been observed that regular participation in an exercise program will usually stimulate an increased awareness and greater interest in other personal lifestyle habits.

As part of an ongoing fitness and lifestyle awareness/educational program, monthly themes might be established. If the human resources are available, a typical month of activities might be as follows:

<u>January - Nutrition Month</u>

Week 1 - Audio-visual presentation "Diet for Life" available from the Nutrition Link.

Week 2 - Film "For Tomorrow We Shall Diet" available from Gordon Watts Films.

Week 3a- Have diet counselling booths set up outside the cafeteria every noon hour. (Make available beforehand diet recording sheets so that people can record their food intake for a period of at least 3 days, thus making dietary assessment easier.)

Week 3b- Speaker on the "Role of Exercise in Weight Control".

Week 4 - Organize informal noon-hour discussion groups on varying nutritional topics:

Monday	-	The vegetarian diet
Tuesday	-	Cutting calorie corners with Canada's Food Guide.
Wednesday	-	Creative low calorie cooking.
Thursday	-	Dietary control of cholesterol.
Friday	-	Introduction to behavior modification.

During Nutrition Month, as many different resource materials as possible should be made available to employees. Sample copies of materials might be tacked up on bulletin boards so that employees know what is available. Pamphlets on nutrition may also be distributed through classes.

With smaller companies, similar activities are possible but on a much smaller scale.

Regardless of company size and financial resources, it is important to include a lifestyle education component in the ongoing program. The Programmer or Consultant should ensure that a certain percentage of time is spent on lifestyle counselling and special health education events.

Active participation in physical activity will generate an interest in personal lifestyle habits such as smoking, drinking and eating. If some health education counselling is not available, your program will not be complete.

Programming possibilities

FITNESS PROGRAMMING POSSIBILITIES AND CONSIDERATIONS

Veronica Marsden

Veronica Marsden is a private Employee Fitness Consultant in Toronto. She completed her training in the field of Kinanthropology at the University of Ottawa. Ms. Marsden has considerable experience in fitness, and was actively involved in the Canada Life Assurance employee fitness program, which was part of a research study funded by Recreation Canada.

A number of different types of fitness opportunities, ranging from exercise breaks to special classes for older workers, are discussed in this section. In addition, Ms. Marsden has also cited many of the operational necessities required for successful program development.

Introduction

In designing an employee fitness program, one of the major objectives should be the implementation of a program that will entice and attract the greatest percentage of participating workers from within a company. It has been observed in employee fitness programs across the country that group exercise classes seem to be most successful at generating an active interest in, and awareness of, personal lifestyle habits. Remedial and specialty programs (such as "Healthy Back" classes and disco dancing), which interest and cater to certain sub-populations, may form an important adjunct to an ongoing employee fitness program. These programs, however, should not be implemented until high participation exercise classes are operating smoothly.

The following discussion will attempt to analyze several program possibilities that can be operated in both on-site and off-site facilities. Some programs discussed do not require any special facilities. To a certain extent the feasibility and success of these programs will depend on company size, available facilities, male-female ratio and available financial resources. Wherever relevant, these factors will be discussed.

The order in which these programs are made available to employees can have a considerable impact on their success. Some form of chronological order for the establishment of various programs will be suggested. It should be noted, however, that this sequence may not necessarily suit every company. In fact, many or most of the "special interest" programs may not be feasible where facilities are non-existent, finances limited, employee numbers low and the availability of resources poor.

Exercise Breaks

The substitution of the traditional coffee break with short six to eight minute exercise breaks has become an increasingly popular practice in companies across Canada. Employers are slowly coming to the realization that mid-morning and mid-afternoon exercise breaks are more beneficial in revitalizing sedentary officer workers than the usual "coffee and donut"

break. Workers involved in highly repetitive tasks seem to benefit most from the stretching and relaxation exercises that comprise the standard exercise break.

Resistance from senior management to a company-wide fitness break program is, in many cases, an obstacle that must be faced by the fitness co-ordinator and/or interested employees. However, senior executives will often agree to a pilot program in order to test the practicality and merits of the exercise break.

In selecting your pilot group it is advisable to choose the type of group who can profit the most from mid-day exercise breaks. Computer programmers, for example, who spend their entire day hunched over computer terminals usually form an ideal and willing experimental group.

Once the fitness break concept has been sold, the following details must be considered in order to launch the program.

Identification of Exercise Break Leaders

Advertising through the company paper and special notices on bulletin boards will usually bring forth several volunteer leaders. If possible, it is adivsable to try and recruit both male and female leaders. Getting senior employees to volunteer will be valuable in generating support for the program and encouraging mass employee participation.

Training of Exercise Break Leaders

In order that exercise breaks be effective, exercise break leaders must receive minimal training in the use of music and the correct execution of suitable exercises. Initially, it is necessary to frequently monitor the leaders, but as they gain experience, monthly meetings to suggest new exercise routines and to discuss any problems which might arise should be adequate.

The exercise break package, including a tape with music for six exercise breaks, plus an accompanying manual of exercises is available for each leader from:

The Department of Health and Welfare
Fitness and Amateur Sport Branch
365 Laurier Avenue West
Journal Towers Building
Ottawa, Ontario
K1A 0X6

The major expense incurred in setting up company wide exercise breaks is the necessity for tape recorders. In most offices, however, dictaphones can be used, thus eliminating the necessity to purchase costly recorders. If dictaphones are not accessible, and the company is not willing to purchase several recorders, exercise breaks can be staggered so that several departments share one recorder.

Walking Programs

Similar to exercise breaks, noon-hour walking clubs can easily be organized regardless of exercise facilities, at little or no expense to the company.

As most individuals are unaware of the physiological rewards of regular walking, the conditioning effects should be well promoted through articles in the company newspaper and/or special bulletins. Highlighting information such as the caloric expenditure in walking will often generate much enthusiasm with weight conscious employees.

The success of a low-keyed walking program can be enhanced by implementing some form of challenge or incentive system. Inter-departmental competitions for "most kilometers walked" over a period of time will certainly boost enthusiasm.

Group Fitness Program

With the majority of companies, where most employees do not work shifts, group fitness classes seem to attract and retain the greatest numbers over a period of time. Many companies have spent thousands of dollars on special strength-developing devices and similarly expensive equipment only to see the apparatus used by a small minority group, usually men. Many businesses, such as Life Insurance companies, predominantly employ women and this emphasis on weight training programs does not make sense.

Even with companies more heavily populated with male employees, the novelty of shiny new equipment wears off very quickly and the boredom of exercising alone sets in.

Individual exercise areas should not be developed at the expense of a group exercise room that will attract a larger employee population. If two areas are available, however, one location should certainly be considered for individual exercising. There will always be exercise enthusiasts wishing to supplement their group program with specific exercises. In addition to the above, there might be shift workers and others who find that group exercise classes conflict with their work schedules.

Obviously, there are many factors that contribute to the success or failure of any fitness program. Each of the following points should be considered carefully before implementing an ongoing program.

Scheduling

In most companies, employees are expected to participate in fitness activities on their own time. Programs, therefore, should be scheduled to coincide with the normal working hours of the company. For example, if most employees work an 8:30 to 4:30 day, classes scheduled from 7:45 to 8:15 and 4:45 to 5:15 will be a guaranteed success, as will classes

held during the noon-hour period. It should be noted that many companies now operate on flexible hours, which will necessitate the co-ordination of varying class times, particularly before and after work.

In setting up fitness classes during the first phase of a company-wide program, serious thought should be given to the intital inhibitions many people exhibit upon embarking on a group exercise program. If possible, both segregated and co-educational classes should be considered initially. As people begin to feel more comfortable with their exercise program, many of these initial inhibitions will slowly disappear. If a company is large enough to warrant several group exercise classes it is advisable to try and keep at least two classes segregated. Feelings of self-consciousness will often remain with overweight and older employees, particularly females.

In the situation where an on-site facility is available, noon-hour classes usually prove to be the most popular. Employees often find it difficult to reschedule car pools and public transportation timetables (particularly at companies located in large communities where many employees travel a great distance to the workplace) to accommodate before and after work classes. In addition to transportation problems, exercise participants often complain of not being physically "up" to vigorous activity early in the morning.

Companies that hire predominantly women will also run into problems with after work programs, as many female employees must rush home to look after children and prepare the evening meal. During the noon-hour period, however, personal commitments are at a minimum, thus rendering this time of day very attractive for participation in exercise classes.

Where off-site facilities exist, before and after work programs are more practical, unless the company is willing to extend the lunch-time period. With cafeteria-type programs, the Fitness Director has no choice but to operate classes before and after work when the lunch room is not in use.

Registration

In scheduling fitness classes, short-term sessions of 8 to 12 weeks are generally more successful than longer sessions. Even though one cannot become fit in 8 weeks, short-term goals may be set and achieved during this period of time. This often provides the stimulus necessary to re-establish a new set of goals that are within easy reach. Even though the second session may be a straight continuation of the first, with no breaks in between, the fact of having another registration period symbolizes something new and different. In addition, there is a tendency to "wait until the next session" to return to class after a day-off due to illnes or some other reason. If sessions are short, the lay-off period is not extensive.

Each time a new session begins there are usually a number of newcomers to the program. If possible, it is sensible to schedule a low-level class so that beginners may progress at their own pace and not be tempted to keep up or compete with others.

Regardless of the financial support provided by the company, it is wise to charge a nominal registration fee. When employees feel they have contributed financially to the operation of a program they seem to feel more strongly that it is their program. An enrollment fee can also be used to screen out people who register simply to show up once or twice out of curiosity. A monetary commitment seems to be the first step toward a sincere effort to continue a program.

In cases where a company is fully subsidizing the program, registration fees can be used to furnish special participation awards or purchase "luxury" items. Companies with limited financial resources could charge higher registration fees in order to partially or completely off-set all ongoing operational costs.

Seasonal Changes

In organizing and operating a year-round fitness program, the impact of seasonal changes should be considered. Structured fitness classes will attract large numbers during the fall and later in the winter months, when many New-Year's resolutions are being made. As the weather turns colder many people rely strictly on fitness classes for their exercise. Spring can attract new participants, especially if promotional campaigns are geared towards "looking good in your new bikini". During the summer months, however, warmer weather and summer holidays result in a tremendous decrease in class attendance. In addition to the above, many individuals feel the need to take a break from the regular routine and prefer to participate in out-door activities with families and friends. Informal walking and jogging clubs are more suitable during July and August.

Class Structure and Format

Most employee fitness classes, particularly at noon hour, must be restricted to 30 minutes. It is recommended that each class be scheduled three times per week so that minimal training effects occur. In order to make maximum use of existing facilities, it is a good idea to offer special interest courses on alternate days. If the demand is high for regular group programs, classes which meet twice a week should be encouraged to engage in other recreational and sporting activities in order to enjoy the full rewards of being fit.

At the initial stage of an ongoing fitness program, most classes should be run at a very low exertion level, with suitable weekly progressions planned. In a larger company, one or two more advanced classes might be considered for the already active population.

A typical beginner's class may consist of a lengthy 7 - 9 minute warm-up comprising locomotor movements and flexibility work; 4 minutes, low intensity aerobic work; 10 minutes muscular endurance and flexibility routines, followed by a 7 minute cool-down and relaxation period. In comparison, a more advanced class might include a 5 minute warm-up; 12 minutes of aerobic work; 8 minutes muscular endurance and flexibility work concluding with a 5 minute cool-down and relaxation period.

In a 30 minute period it is difficult to give a complete workout. Employees interested in spending additional time on a component of fitness, *i.e.*, aerobics, should be encouraged to supplement their program through participation in other activities.

Most traditional fitness programs rely on straight jogging for the aerobic conditioning portion of the class. Many companies, however, have limited exercise space and even a short period of straight jogging can be very boring. It is imperative, therefore, to utilize as many alternatives as possible to achieve cardiovascular conditioning. Simple dance steps such as the Polka and Charleston have been used successfully in both men's and women's classes. Other jogging alternatives might include skipping, stationary jogging routines and jogging formations.

As well as changing the aerobic portion of the class, it is imperative to vary the other class components in order to avoid the monotony associated with traditional fitness programs. This can be achieved through the use of circuits, interval training, balls, skipping ropes, wands, partner exercises, wall routines and simple games. It is important to have a small element of surprise in each class so that participants look forward to a new activity or exercise each time they come to your program.

Preventing Program Dropouts

Most fitness instructors accept a high drop-out rate in their fitness classes as normal. A tapering off of attendance around the middle of a 10 to 12 week exercise program may be common, but should not be considered either normal or acceptable. If attendance figures do start to decline, the following key ingredients to a good exercise program should be analyzed:

(a) Educational Component

Even in a 30 minute program it is important to include a small educational component in each class. In this way, employees will be taught to develop an appreciation for and understanding of proper exercise techniques, as well as associated training effects. The following are suggested topics that might briefly be covered over the period of an 8 to 12 week exercise session:

1. The regulation of exercise intensity through heart rate monitoring.
2. Exercise precautions.

3. Special exercises to prevent lower back pain.

4. Exercise and weight control.

5. Jogging techniques.

6. Proper exercise clothing.

7. Fitness and nutrition.

8. The principles of a warm-up and cool-down.

In addition to group information sharing sessions, the Fitness Co-ordinator should ensure that his or her instructors are available at least 15 minutes before and after each class to deal with additional concerns or questions that participants might have. In this way, good instructor-participant relationships - the key to a successful program - are established.

(b) Use of Music

The use of music is, without a doubt, one of the greatest motivational tools in fitness instruction. Just as music can create a relaxing atmosphere in a restaurant, appropriately selected music can create an enjoyable exercise environment.

Music is most effective in stimulating a class to work hard when the particular selections suit the exercises that have been planned. For example, marching music and many disco pieces, which have a very definite beat, are ideal for the walking routines that usually comprise much of the warm-up and cool-down portion of a class. Walking exercises can be done to music ranging in metronome speed from approximately 116 to 126 beats per minute. Relaxation movements, on the other hand, are most effective when conducted to a more mellow tune. The following chart includes suggested metronome speeds for various activities.

Activity	Metronome Speed
Fast jog	166-174
Slow - moderate jog	150-166
Walking activities	116-126
Stationary aerobic routines	132-144
Skipping, sliding, slide jumps	120-126
Calisthenics	60-120

For most sections of the class, instrumental music is preferable to vocals. When the instructor is trying to explain an exercise or correct a specific movement, the competition of lyrics can be very distracting. Vocals, however, are suitable for activities such as jogging where participants are concentrating more on the activity than on the instructor. Encouraging participants to snap their fingers, clap to the

rhythm and sing along with the music can add a tremendous amount to the enjoyment of the activity and to the group's *esprit de corps*.

The use of pre-recorded tapes, particularly in short 30-minute programs, is superior to records. Tapes ensure a well-planned and well-balanced class, since music is selected to suit the workout beforehand. For example, if 8 minutes of aerobic work is planned for a specific class, 8 minutes of suitable music for jogging and skipping etc. is pre-recorded. In addition, tapes are more portable, durable and practical than records. When records are used, the instructor must either plan an entire class around a couple of albums or constantly run over to the record player to change the disc. This is not only distracting to class participants, but is also time wasting.

One of the best means of starting a music library from which to tape is by recruiting records from class participants. Often placing an ad in the company paper or sending out a special bulletin will prove rewarding. In seeking exercise music the following artists or bands are usually a big hit:

Piano Music	-	Mrs. Mills
	-	Frank Mills
	-	Scott Joplin
	-	Ferante & Teicher
	-	Rob Liddell
	-	Andre Gagnon
Instrumental	-	The Pucker & Valve Society Band
	-	Julius Wechter and the Baja Marimba Band (four-sider album is good)
	-	Bert Kaempfert
	-	Tijuana Brass
	-	The Ventures
	-	Lalo Schifrin
	-	Village Stompers
	-	James Last
Vocals	-	Barry Manilow
	-	Neil Diamond
	-	The Beach Boys
	-	Billy Joel
	-	Tony Orlando and Dawn
	-	The Captain and Tenille

Special movement records for physical education classes can be obtained from:

Can-Ed Media Limited
185 Spadina Avenue
Toronto, Ontario
M5T 2C6

Excellent exercise music can also be obtained by writing to the Swedish Gymnastic Federation:

Svenska Gymnastik Forbundet
Box 22076
104 22 Stockholm
Sweden

Two good albums to ask for are "*Non Stop*" and "*Borja Dagen Battre, Boja Magen Battre*".

(c) Motivational Contests

Periodic contests between exercise class participants can do much to boost and maintain interest in the fitness program. In scheduling various incentive programs, it is advisable to pick a period when attendance is usually poor, such as a couple of weeks prior to Christmas, or the end of a 12 week session. Awards should be carefully selected to encourage further participation in physical activity, for example, T-shirts (with company logo), skipping ropes, small hiking packs, and paper-back books on exercise and nutrition. It is advisable to set a contest goal that most participants can reach.

(d) The Fun Aspect

The initial enthusiasm displayed by new program participants is usually dampened once the boredom of a repetitive, traditional exercise routine sets in. As mentioned earlier, exercise teachers must rely heavily on their imagination and creative powers in order to plan an interesting class that contains a little element of suprise each week. Ways of varying class routines have been mentioned in the section on class format.

In most exercise classes there exists a wide range of fitness levels. For this reason it is important to stress the non-competitive aspect of your program. It is not uncommon for less fit participants to drop out due to the frustration of not being able to keep up with others.

The instructor should encourage laughter, conversation, moans and groans etc. in class rather than following a more formal, regimented style of teaching. Such informality will help to establish a class spirit, and help make each participant feel he or she belongs.

Individual Programs

In general, individually prescribed exercise program do not have the same kind of appeal and long-term success as group exercise classes. With most individuals, the motivation to exercise alone is low. There will always be employees, however, who either do not enjoy exercising in a group environment or whose work schedules are not compatible to regularly scheduled classes. Others may wish to supplement their group workout with additional exercises. The Fitness Director, therefore, should make individual counselling available to all employees.

In prescribing individual exercise programs, it is important to keep in mind the person's needs, interests, lifestyle and financial status. Wherever possible, clients should be encouraged to select enjoyable activities which can be engaged in with family and friends on a regular basis. Participation in the *Fitness Ontario Adult Awards Program* and the *Fit-Together Program* (available from Fitness Ontario, 77 Bloor Street West, 2nd Floor, Toronto, Ontario, M7A 2R9) should be discussed and encouraged as a motiviational tool.

In counselling employees in good exercise patterns, a lack of time and inaccessibility of facilities are often cited as barriers. In this situation, where an individual is not willing to set aside regular exercise periods, you should encourage small, lifestyle changes such as stair climbing (instead of elevators), walking to the corner store, window shopping (at a brisk pace) at noon hour etc. These activities, supplemented with stationary skipping and light calisthenics, which can be done at home, will provide a good starting program for most individuals.

Jogging and Cycling Programs

During the hot summer months, with most employees taking holidays, it is a good idea to replace structured fitness programs with informal jogging and cycling clubs. Summer is also a time when most individuals seem to enjoy a break in routine activities.

In setting up a jogging club, it might be a good idea to train volunteer leaders from within the company to take charge of these small group activities. Leaders should receive instruction in proper warm-up techniques and heart-rate monitoring before taking charge of a group. In addition, different routes of varying distances around the work site should be outlined on maps placed at strategic sites around the building.

Over 45 Programs

In a fairly large company, particularly one where a high percentage of employees are middle-aged, the interest in a special lower-level program may develop. In particular, women over the age of 45 or 50 will often not involve themselves in regular programs for fear of not being able to keep up.

Remedial Programs

Two occupational hazards associated with sedentary office work are creeping obesity and lower back pain. Remedial programs to counteract or prevent these problems constitute a good adjunct to an employee fitness program. With the countless numbers attempting to quite smoking, special programs to help and encourage these individuals are also suitable for the worksite.

The "Y's Way to a Healthy Back" Program

The remedial exercise program was developed in 1974 by Dr. Hans Kraus, Chairman of the Medical Advisory Board of the New York Y.M.C.A. and Alexander Mellaby, also of the Y.M.C.A. The *"Y's Way to a Healthy Back"* program is now an internationally recognized exercise program for back pain sufferers.

The 18 healthy back exercises that comprise this program were designed on the theory that over 80% of all lower back pain is a result of poor strength and flexibility of key posture muscles, and constant tension. Relaxation exercises, coupled with mild stretching and strengthening exercises, therefore, make up the program.

Most Y.M.C.A.'s and Y.M.-Y.W.C.A.'s across Canada are presently offering this course, and many Y's have their own instructor/trainers who are certifying other professionals to teach the course. Many Y's will also provide certified "Healthy Back" instructors to companies interested in offering this six week course.

Weight Loss Programs

Because most weight problems are brought on through inactivity, it is important to include both a nutrition counselling and exercise component in a program. If possible it is advisable to schedule a special exercise period for the group, as opposed to integrating them into an ongoing regular class. Overweight individuals are generally very self-conscious about their appearance, particularly in gym clothing. In addition, obese people will usually progress at a slower rate than normal weight adults, and are easily discouraged when unable to keep up with the others.

Many companies have an occupational health nurse whose expertise can be invaluable in designing weight control programs. If financial support is available for remedial programs, the hiring of a dietetic consultant will probably enhance the quality of the program. Where minimal funding exists, the physical educator might consider consulting with a 3rd or 4th year dietetic major. Often these students can count their work experience with you as part of an internship and remuneration is unnecessary.

Quit Smoking Courses

The workplace is an ideal location to offer a "Quit Smoking" program. It is, however, advisable to rely initially on the expertise of a professional to run such a course.

Many cessation programs such as *Smoke Enders* are very costly, however, non-profit organizations offer similar courses at a minimal cost. These organizations will usually provide a resource person to go into a company in order to run the program at the worksite. Your local community college or your local lung association either run such courses or may be of assistance in recommending resource people.

The *Metro Toronto Interagency Council on Smoking and Health* is presently considering becoming involved in the testing of a new cessation program, which will be run by highly trained volunteers at minimal cost. For further information contact The Ontario Heart Foundation, or The York Toronto Lung Association.

In the Toronto region non-profit courses are offered to companies through

(a) The York Toronto Lung Association (contact person: Lyn Haynes - phone 226-1454

(b) The North York Branson Hospital (contact Person: John Corban - phone 633-9420, ext. 201

A do-it-yourself quit smoking guide has recently been published. Single copies may be obtained by writing to your local Lung Association or Heart Foundation.

Dance Programs

Offering various types of dance classes can be a popular adjunct to an ongoing employee fitness program, particularly in companies where a large percentage of workers are female.

The type of dance program offered should depend on both interest, teaching resources avilable, and ratio of males to females in the company. Modern dance, jazz and rhythmics are forms of dance which appeal more to women than to men, however disco classes attract men and women alike. Before hiring a dance instructor it is a good idea to check internally within the company for possible resources.

Dance instructor contacts can generally be made, as well, by contacting your local Y, community college or university.

Couples Fitness Programs

A special evening program where employees may bring their spouse (girl-friend etc.) can be a very attractive addition to a small-town company where few of the employees commute from a great distance. Even in a large metropolis a couples fitness program can be successful.

The only problems which might develop are with the building security and the possible need for additional staff to run the program. If your day-time program operates on volunteer leadership there is no reason why evening classes can not be run in a similar fashion.

An evening program need not be restricted to half-hour exercise periods as participants will probably keep the entire evening free on class nights. As a matter of fact, it might be a good idea to schedule a whole evening's activities in order to make the trip back to the office worthwhile.

Cafeteria Programs

Because many companies operate their own cafeterias, the lunch room is an excellent location for implementing a nutrition education campaign. Before launching an educational program, it is usually necessary to work in co-operation with cafeteria staff as one of the first steps might be to make minor changes in food selections, *i.e.* from white bread sandwiches to more whole wheat bread and rye selections, to additional fruit, low calorie salad plates, skim milk and plain yoghurt.

The following suggestions on how to design a nutrition education campaign may be utilized in cafeterias of all sizes.

1. A wall or free standing bulletin board might permanently display nutrition education pamphlets, which are available in the fitness office or resource library.

2. Attractive posters displaying nutritious food selections may be placed around the cafeteria.

3. A series of slogans designed to help employees examine their food style, e.g. "You Are What You Eat" might be used in conjunction with attractive posters.

4. Plan a special nutrition week where everyone eating a balanced meal, *i.e.*, something from each food group, is given a small award or button.

5. Place small cards on each table featuring simple tips that can easily be absorbed and digested over the meal. The message on these cards should be changed regularly, and occasionally the cards might feature a low calorie recipe.

6. Place calorie comparison charts near the food selection area comparing, for example, the calories in a plain apple with the calories in a piece of apple pie.

7. Establish weekly or monthly nutrition themes in the cafeteria, for example, declare March to be Down with Sugar Month.

Summary

In this section, several programming possibilities have been discussed. It is important to remember that these program options should not be organized at the expense of group fitness classes. Servicing as large a group as possible should remain the major focus of an employee fitness program.

Facility considerations

FACILITY CONSIDERATIONS IN EMPLOYEE FITNESS PROGRAMMING

John Campbell

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Introduction

Facility availability is often a major stumbling block in developing an employee fitness program. While an on-site facility is undoubtedly most conducive to ensuring a successful program, many employers are reluctant to invest money in major renovations or additional facilities until they are convinced that the program is warranted.

In light of this problem, the following discussion will centre around various possibilities for fitness program facilities, including on-site facilities. In addition, attention will be focused on the ideal, complete, fitness centre and its various components. Of course, it is important to realize that such a centre may be unrealistic and that compromise, based on the realities of the situation, is often necessary.

Before discussing possible facility locations, let us first examine the major considerations for an employee fitness facility.

Primary Considerations

Program Objectives

The facility should meet the objectives of the program. However, in some cases, the program will have to be adapted to the limitations of the facility. The main objectives of an adult fitness program are threefold.

1. Increase cardiovascular fitness. To attain this aim, aerobic-oriented activities such as brisk walking, jogging, cycling, skipping or swimming are recommended. A running track, treadmills, carpeted hallways, exercise bicycles, skipping mats or step benches may be necessary for the indoor component of the program. If outdoor facilities are available for walking, jogging, skating or swimming, these can be utilized by some of the participants on a year-round basis.

2. Increase muscle strength and endurance. Depending on available space and budget limitations, equipment such as barbells, dumbells, a universal gym, sit-up boards or wall-pulleys may be obtained. (This equipment is not essential to initiate an exercise program.)

3. Increase flexibility. Very little space and equipment are needed for this aspect of the program. Thick carpets or gym mats are generally all that is required for some of the warm-up and flexibility items.

Locker Room Facilities

Shower and changing facilities must be available where any type of vigorous exercise program is offered. People returning to their jobs after exercise should feel comfortable and refreshed. The availability of shower and locker facilities will also encourage individuals to walk, jog or cycle to work.

Accessibility

The fitness facility must be as accesible as possible to the program participants. The greater the inconvenience, time and expense required to get to the facility, the greater will be the chance that people will not attend the program. As stated earlier, the facility should be located at the work-site. If the facility is not on-site, it should be within a short walking, driving or busing distance.

Finances

The facility must be designed so that costs are not prohibitive. Whether the program is funded entirely by the employer, the employees or by a combination of the two, the cost must be such that anyone wishing to become involved in the program may do so.

First Aid

First aid facilities should be in close proximity to the exercise areas. A cot or a bed, bandages, ice and splints must be close at hand. Depending on the size of the facility, the personnel, and the type of programs being offered, more involved first aid considerations will have to be made. (This subject will be dealt with in greater detail later in this section.)

Locating a Facility

When locating a fitness facility, the following four options are available:

1. "Off-site" facility - program organized by outside agency
2. "Off-site" facility - program organized by the employee group
3. "On-site" facility - program organized by outside agency
4. "On-site" facility - program organized by employee group

Various combinations of outside agency and/or employee group organization may also exist. Consultation from outside agencies may be required

during the program's initial stages. As the program progresses, the employee group may be able to completely take over its administration.

1. "Off-site" Facility - Organized by Outside Agency

Where an off-site facility is utilized, it is essential that the time and effort required to get to the facility is minimal. Transportation to and from programs offered before or after regular working hours should generally be the responsibility of the participant. A bus service can be provided for the employees if the program is offered during working hours, e.g., at lunch-time. The cost of this service could be covered by the employee and/or the employer, or by the outside agency that is involved.

Agencies such as Y.M.-Y.M.C.A.'s, Colleges or Universities, Community Centers, and private clubs may be able to offer programs to employee groups. Depending on the facility and time considerations, programs may be run for a particular employee group exclusively, or members of a particular employee group may be absorbed into an on-going program at the agency. Some agencies may be willing to provide a company membership package, to be used on a rotating or first-come-first-served basis. Under these circumstances, the particular outside facility could be used by a number of different employees at various times.

While this option may be economically more feasible, its inconvenience may well cause the program to be unsuccessful.

2. "Off-site" Facility - Organized by Employee Group

There may be numerous facilities situated in close proximity to the work site that could be adapted to meet the needs of the fitness program. School gymnasiums or classrooms, church basements, vacant stores or warehouses, or community centres are all potential facility sites. Depending on the qualifications and experience of those organizing the employee group, an outside consultant may be required in the organizational phase of the program.

3. "On-Site Facility

A fitness program offered at the workplace, because of its convenience, will generally be much more appealing to the employees. The extent and scope of the facilities will depend on the number of people involved, the space available and the qualifications of the personnel organizing the program.

There are three main types of fitness facilities that can be incorporated into existing worksite space or added to an already present facility. Naturally, selection will be determined by available space and budget restrictions.

(a) Individual Exercise Room

An exercise room for individual usage can be developed in an office, meeting room, classroom, storage room or hallway. Areas as small as 300 square feet can be equipped as exercise areas. A very small area may be utilized, providing there is scheduling of the participants so that workouts can be completed with a minimum amount of waiting time.

Bicycle ergometers, treadmills, stepping benches or skipping areas can be included in small individual exercise areas. Depending on the size of the area, a limited amount of weight training apparatus can be incorporated.

Wall space can be used for chinning or dip bars, wall pulleys, stall bars or sit-up boards. If space permits, a universal gym or various components of a universal gym can be included.

An individual exercise area should also have a clock, a bulletin board and a display area, a file cabinet and possibly a set of weigh scales.

(b) Group Exercise Room

Where group exercise classes are scheduled, a space of at least 1,600 square feet is necessary. Certainly, the larger the area the better. People need room to walk, jog, skip and move freely without running into pillars, walls or each other.

A jogging area should at least be carpeted, although a rubber-type matting or synthetic surface may be preferable. A very hard surface such as concrete or tile is not advisable, as this may lead to ankle, knee, hip and shin splint problems. A banked-track is ideal, but certainly not a necessity. Any pillars or posts in the exercise area should be padded.

If the space inside the track area is large enough, individual exercise equipment can be situated in the middle of the track. Part of this space can be utilized for the stationary exercises practised by group classes while individuals work out in the rest of the area. Where both group classes and individual work-outs are taking place simultaneously, the two areas should be separated. (Equipment, such as sit-up boards and bicycles, makes excellent dividers.) This open concept is very appealing, as it allows for more interaction, both visual and verbal, among the participants. With more people working out together, boredom, so often present when exercising alone, should not be experienced. Supervision of an open area is also much easier.

A group exercise area may be supplemented by an individual exercise room. This room can be equipped with more strength related apparatus, such as a universal gym, wall pulleys, dumbells, barbells, and sit-up boards.

(c) Full Fitness Centre

A full fitness centre will increase the cost of the fitness program to the employer, and possibly to the employee, but depending on the number of people involved and the demand, the extra cost may very well be warranted. This type of facility should have a running track, with both individual and group exercise space included inside the track area. The addition of squash, racquetball or tennis courts, a swimming pool and various spa facilities, such as whirlpools and saunas, would be ideal. Many individuals would rather become involved in a fitness program that offers racquet oriented sports. Although the number of people able to use these facilities on an hourly basis is quite small compared to the number of people able to utilize the track and exercise areas, such courts would be a valuable addition to a fitness program. Large storage areas or warehouses could also be adapted so that a modified version of handball, racquetball or squash may be played.

If the facilities are very extensive, it may be possible to utilize them after working hours, *i.e.*,on evenings and weekends. Possibly, the facilities could also be made available for a fee to other employee groups or to members of the public. In this way, part of the costs could be absorbed by outside groups.

A full fitness centre would require more specialized maintenance, as well as additional cleaning and professional staff. Obviously, the administration of such an extensive facility would be beyond the capabilities of a volunteer group.

Additional Considerations

Shower Facilities

It can not be stressed too strongly that wherever participants are involved in the type of exercise program that leads to an elevation of heart rate and body temperature, showers and changing facilities are essential.

Prefabricated trailer units can be used to provide shower facilities in situations where they cannot be added to existing facilities. Moreover, such units would have the added benefit of permitting individuals to shower after cycling to work; after lunch-hour running or jogging; or after participating in a structured exercise program held during the working day.

If funds and space permit the addition of showers to existing facilities, it would be ideal if provision for hair dryers and mirrors could also be included in the renovation plans.

In executing such renovations or additions, all specifications outlined by the Ontario Ministry of Health and by municipal building by-laws must be met. It has been recommended that one shower be provided for every 100 individuals utilizing the facility.

Where shower facilities cannot be provided, a very light exercise program, such as the "Fitness Break", or low-level recreational programs, such as table tennis or billiards, should be offered.

Lighting

A bright, well-lit exercise area is essential. Certainly, some natural lighting will enhance the surroundings. Lights should be of uniform size and power, and should have a switching arrangement that allows them to be turned off when the facility is not in use. Emergency lighting is a necessity in shower, locker, and exercise areas. If the facility has window access, it is desirable that windows do not look onto busy hallways or streets, as many individuals are initially very apprehensive about exercising, and do not wish to be seen by passers by.

Carpeting

A dark-coloured carpet is best for exercise and locker areas. Areas where the traffic is very heavy may require an especially durable carpet, or rubber or synthetic matting. Keeping the carpet clean is essential, so provision for regular vacuuming and washing must be made. To help keep the cost and frequency of cleaning down, it is suggested that men always wear shirts while exercising.

Decor

The colourful and imaginative use of paint will make an exercise area much more appealing and stimulating. The use of graphics and bright colours around the track area can help alleviate some of the boredom associated with walk/jog or cycle programs.

Gone are the days when the word "exercise" conjured up visions of interminable knee-bends practised in dark, dingy, cramped rooms!

Music

The use of music is vital to the success of any group exercise class. An individual exercise area can also be enhanced by the use of background music. A cassette system is superior to reel-to-reel tapes, records or AM/FM radio stations. Tapes made up for group classes can be used as background music, or to actually lead the exercise class. Speakers should be situated so that sound is not distorted (ceiling, walls or posts are ideal locations). It is advisable that the sound system be locked away when not in use, however, it should be easily accessible to all instructors.

Ventilation and Heating

A well-ventilated exercise and locker area is very important. If the exercise room is too warm and is poorly ventilated not only will it be uncomfortable, but it may also be potentially dangerous, due to participants' increased heart rates and body temperatures.

Where already existing facilities are adapted to accommodate the fitness program, large fans may be used for air circulation.

First Aid Facilities

As stated earlier, any exercise area should have access to a satisfactory first aid facility. Minimum requirements include a first aid kit (Type A-Ontario), a first aid manual, a bed or cot, and a telephone with emergency phone numbers attached. It is desirable, as well, to have ice and tensor bandages available to treat sprains, bruises etc.

In programs for higher risk individuals, when there are physicians within easy reach a defibrillator, drugs and ambubag should be available.

Regardless of the type of equipment on hand, everyone involved in running classes, supervising programs, or doing exercise testing should be trained in first aid and in Cardiac Pulmonary Resuscitation (CPR). Refresher courses should be held on a regular basis, *i.e.*, every one to two years.

Outdoor Facilities

1. Fitness Trails. In some circumstances Fitness Trails can be developed on outside lawns, parks or in wooded areas. Although Trails may be developed for the exclusive use of the employee group, they can also be planned and financed with the co-operation of community groups or municipal governments, and as such be beneficial to the community at large. Depending on its size and location, the Fitness Trail can be used in the winter for cross-country skiing. (Recreation Canada has compiled a valuable booklet on Fitness Trails, which provides information on site selection, layout and equipment.)

2. Roof Top facilities. A roof top could easily be adapted for a running track, paddle-tennis or tennis court, or an outdoor exercise area. In most areas the season for such outdoor activities is fairly short, but the expense of establishing a roof top facility is generally not too high. All equipment used in outside facilities should be water-proof. Adequate drainage must also be provided.

Control Areas

All exercise and locker facilities should be accessible only to those individuals who are eligible to use the facility. Theft, vandalism and misuse of equipment and facilities can be kept to a minimum if some type of control system is in effect. Generally speaking, when the fitness area is part of an existing complex, problems of this nature are minimal. A facility that is separate from the place of work may require a more sophisticated security system.

Any new facility or addition to an already existing facility must meet all federal, provincial and municipal building, health, fire, and sanitation codes for quality, safety and construction.

Conclusion

From the foregoing discussion, it is apparent that a knowledge of the continuum of employee fitness facilities suitable for providing various types of fitness programs, either at the worksite or in conjunction with it, is essential.

Armed with this knowledge, the Fitness Consultant should be able to assist an employer or employee group to locate a facility that will provide the greatest potential for a successful and rewarding fitness program.

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Fitness testing

FITNESS TESTING

John Campbell

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Introduction

During the past decade, interest in physical fitness testing has increased dramatically. Considerable research in the area has led to vastly improved testing techniques. In light of these advances, there is no reason why fitness testing should not be an integral part of the initial educational and motivational phase of a physical fitness program.

In order to prescribe an appropriate exercise program, the would-be participant's present health, activity level and fitness status should be identified. This can be accomplished via a health-history questionnaire and/or medical examination and a physical fitness test.

Given the importance of testing, the following discussion will focus on the various components of a fitness testing program. Many of these testing techniques can be employed with minimal equipment and technical expertise. Also included are some examples of *Assessment Reports*, which are easily obtained through provincial and federal government offices. But first we should identify the reasons that make testing and screening such crucial components of a physical fitness program.

Why Is Fitness Testing Important?

Fitness test results indicate the subject's fitness level. Tests help determine the subject's cardiovascular efficiency; the strength and flexibility of various muscle groups and joints; and define body-fat percentage and optimal body weight. Tests also help identify major weaknesses or problem areas that may contraindicate a particular exercise regimen.

Secondly, the results of an exercise test are the base on which to formulate a sensible exercise program. For example, training heart-rate range or walk/jog speed can be determined from the cardiovascular component of the test. Results from strength, endurance and flexibility tests all give the instructor clues to program adaptation that will accommodate identified areas of weakness. Anthropometric and skinfold measurements are useful in determining the duration and intensity of the aerobic program, as well as any adjustment in diet. Exercise tests not only motivate people to become involved in a fitness program, but also stimulate participants' commitment to the program. In the latter instance, follow-up testing is a significant contributor to successful long-term motivation.

In addition, the explanation of tests and test results are part of the participant's education in physical fitness. With this in mind, the significance of each test item should be clearly explained to the participant. People will be more willing to participate continuously in a fitness program if they understand the rationale behind the program.

Finally, various test results may be useful to a participant's physician. While the degree of this usefulness will depend on the level of testing, basic test results such as resting blood pressure and body-fat percentage are important facets of an individual's total health profile. Electrocardiogram readings, taken both at rest and during exercise, are also valuable to the physician. Test results that indicate an abnormal blood pressure response at rest or during exercise, an abnormal electrocardiogram response or various other irregularities could provide diagnostic value for the physican.

Components of a Physical Fitness Testing Program

The four crucial components of a physical fitness testing program are promotion, screening, testing protocols, and "feedback" or educational sessions.

Promotion

Without adequate promotion even the most worthy physical fitness testing program will achieve minimal results. What should you do to promote your program? Have you considered total radio, T.V. and newspaper coverage? Remember, the media are as anxious for news as you are for coverage. And be sure to make the most of publicity coverage accorded the fitness testing -- promote the total exercise program as well as the testing component.

Consider staging test demonstrations at specific community locations, e.g., shopping centres, community centres, offices and exhibitions. Supplement these demonstrations with handout material, ongoing films or slides and presentations. Simple measurement tests such as vital capacity, blood pressure, skinfold density or grip strength can be conducted on a continuing basis.

Try to interest local politicians or media personalities in the testing program. Such additional "colour" does wonders for promotion!

Your fitness and testing program will require support from the local medical community. There are usually a number of physicians who are interested in such programs and you will find their assistance invaluable in all stages of the program, including promotion.

Screening Processes

Before embarking on a fitness program, all would-be participants should be screened for possible health or medical problems. A full medical clearance for all participants, while admirable, would be too costly and time-consuming to implement.

However, The Canadian Heart Foundation's Committee on Exercise Testing and Exercise Programs to Improve Cardiopulmonary and General Physical Fitness has recently reported that

> "People with known or suggested heart disease, high blood pressure, palpitation, chest pain, diabetes, unusual breathlessness or other medical problems should have medical clearance. For individuals over the age of 40 who feel in good health it is suggested that they go through an appropriate medical examination before undertaking a major increase in physical activity."

Appropriate health questionnaires should be employed to disclose those individuals who require a more comprehensive evaluation prior to participating in a fitness program.

PAR-Q

The Physical Activity Readiness Questionnaire (PAR-Q) (Chisolm, et al.) is an excellent first-level screening tool. *PAR-Q* is a self-administered questionnaire consisting of seven questions. These questions are designed to identify individuals for whom exercise may be detrimental. People who respond positively to any of the questions should consult their physician before undertaking a test or exercise program.

PAR-X

Where a second-level screening is required, the *Physical Activity Readiness Examination (PAR-X)* should be conducted (Chisolm et al.). *PAR-X* is the medical component of the *PAR-Q*.

Other health and medical questionnaires (see Appendix) should be used to elicit more specific information where required.

Individuals who require more extensive screening or testing should be referred to their personal physician. The fitness program's medical consultant(s) should also be informed of any abnormalities or difficulties encountered during the screening process. The consultant may then become involved in any decisions regarding an individual's specific program.

Finally, the program co-ordinator must not only keep informed about these at-risk participants, but also maintain regular personal contact with these individuals. Somewhere between arranging time-off for a further evaluation and keeping the doctor's appointment for the examination, these individuals are likely to decide to abandon the whole idea of exercise program participation. And it is precisely this type of person who is most in need of guidance and individual attention.

Informed Consent

Prior to undergoing an exercise test, an individual should be informed of the testing procedures and the possible hazards inherent in a testing

situation. A consent form should then be signed by each individual undergoing an exercise test. A consent form is, of course, no protection against negligence.

Testing Protocols

The following factors all help dictate the type of test protocol:

- The training and expertise of the testing staff.
- The equipment and facilities available at the testing site.
- The types of programs being offered.
- The individuals being tested.

Very basic testing can generally be carried out by staff who possess fundamental expertise. However, experienced, well-qualified personnel and physicians will be required if ECGs are taken, or if near-maximal testing is carried out.

It is recommended that anyone involved in an exercise testing program be trained in CPR. (CPR-Basic Life Rescue Courses are now widely offered: contact your local Red Cross, "Y", or college or university for course locations).

The American College of Sports Medicine has recently defined the requirements for physicians, program directors, exercise leaders and exercise technicians involved in exercise testing and conditioning programs. In addition, the American College of Sports Medicine is now offering certificate courses for personnel involved in exercise programs.

On the local scene, a number of Ontario-based groups are currently working on guidelines for fitness testing programs.

Equipment availability is often dependent on the testing program's budget allocation. Where equipment is limited or unavailable, it may be possible to borrow or rent equipment from local hospitals, schools or private fitness clubs. (The Appendix lists standard testing equipment.)

The type of testing undertaken will depend on the objectives of the exercise program. The main objectives of an adult fitness program are:

- to increase cardiovascular fitness;
- to increase strength and muscular endurance of the major muscle groups (abdomen, lower back, upper body);
- to increase flexibility of major joints and muscle groups (lower back, shoulders); and
- to obtain and maintain optimal body weight.

The testing protocol should be designed so that the parameters being stressed in the actual exercise program are also being measured in the pre- and post-test situations.

Let us now consider some major testing methods suited to each of the above program objectives.

Cardiovascular Fitness Testing -- Part I

The most extensively applied method for testing cardiovascular fitness is to examine the subject's heart rate during or after exercise. The best single indicator of an individual's cardiovascular fitness is his/her maximal oxygen uptake (VO_2 max). VO_2 max reflects the diffusing capacity of the lungs, the ability of the heart to pump blood, the efficiency of the circulatory system to transport oxygen and the capability of the tissues to utilize this oxygen. In order to measure VO_2 max directly, you will need equipment for gas analysis.

It must be noted that testing protocols for cardiovascular testing are generally complicated. As a result, more personnel are needed to carry out the testing. The outlay in time, equipment and expense is correspondingly high.

Cooper's 12 Minute Walk/Run

No special equipment is required for measuring the results of *Cooper's 12 Minute Walk/Run* (Cooper). As a result, large numbers of people can be tested at one time. Moreover, the test is easy to administer (it may be self-administered) and standard norms are available.

The test does have some disadvantages. As no ECG or blood pressure monitoring is carried out, the participant may become injuriously over-stressed. In order to conduct the test, a track, gym, and measured route are required. Finally, pre-test training is necessary for the pacing component of the test.

The Canadian Home Fitness Test

This test, which is utilized by many fitness centres across Canada, is included in the *Standardized Test of Fitness*, developed by The Ministry of State for Fitness and Amateur Sports. The test may be self-administered, although this could lead to difficulty in obtaining an accurate pulse count, and does preclude participant monitoring. Apart from a record player and steps, no specialized equipment is required.

Although the test is not particularly strenuous, some participants may find the musical cadence somewhat difficult to follow.

The advantages, however, could well outweigh the disadvantages. Standardized norms are available for the *Canadian Home Fitness Test*. Self-screening by means of the *PAR-Q* is feasible. The test also provides a prediction of VO_2 max and walk-jog time. If the test is professionally administered, ECG monitoring may also be included in the testing protocol.

Bicycle Ergometer Tests (Astrand and P.W.C. 170)

These tests (see Resources #2 and #4) are standardized tests that enjoy a definite scientific/paramedic appeal.

While the cost outlay for equipment such as a bicycle ergometer, stethoscope, sphygmomanometer, and metronome is not excessive, specialized personnel must be on hand to administer the tests, thus adding to the cost of the test. Again, as provision is made in these tests for ECG and blood pressure monitoring, qualified personnel must be involved. Further, as these tests are quite strenuous, physician involvement may be called for. As a result, costs will be higher than with simpler tests.

As this testing equipment is generally not portable, a participant is unable to do the test at home. Both employer and employee may look unfavourably on the need to set aside a block of time during the day in order to take these tests.

One last disadvantage in cycling tests is that the strength of the participant's quadricep muscles may limit the effectiveness of this type of test.

Treadmill Testing

Treadmill testing (Bruce et al.) has many excellent advantages over other testing protocols. These advantages help offset the considerable cost in equipment and personnel incurred in this type of testing.

Treadmill testing follows a standardized protocol. ECG and blood pressure monitoring may be carried out during testing. Treadmill testing also has a diagnostic value. It is easier to ascertain a participant's limited maximum capacity via a treadmill than bicycle ergometer. In addition, treadmill testing offers exercise prescription capabilities.

Excellent though treadmill testing may be, it does have some drawbacks. Treadmill testing is very time consuming (20 to 30 minutes per person). It is not portable. The strenuous nature of the test and the sophistication of the equipment demand highly qualified personnel, which translates into increased costs.

Finally, in a situation where near-maximal testing is involved, motivating participants could well prove a problem.

Cardiovascular Fitness Testing -- Part II

Because cardiovascular testing is perhaps the most vital testing element, fitness personnel should be aware of some of the concerns attached to this testing procedure. These concerns are considered in the following section.

Blood Pressure Measurements

Blood pressure should be measured at rest, prior to doing any other measurements. A measurement of blood pressure during exercise is also valuable. It is relatively easy to measure blood pressure during bicycle ergometer and treadmill testing. With practice blood pressure may also be measured during stepping exercise.

A hypertensive or a hypotensive blood pressure response to exercise will aid in establishing an appropriate training heart-rate range for an individual. A hypertensive response to exercise may also be indicative of potential blood pressure problems at rest. With this knowledge, appropriate preventative measures may be initiated.

Electrocardiogram

Although electrocardiogram monitoring during exercise is advocated by many physical fitness educators and physicians, controversy still abounds as to the qualifications needed by the person using the ECG and interpreting ECG results.

If ECG monitoring as part of an exercise test is done for diagnostic purposes, the ECG reading *must* be interpreted by a physician.

Where an ECG reading is taken only to provide a record of heart rate, the individual being tested must be informed of this fact. The tester must be able to recognize (but not interpret) major abnormal ECG responses. Individuals displaying abnormal ECG responses should be referred to their personal physician and the program's medical consultant.

Physician Supervision

Supervision by a physician is essential for some high-risk individuals who are undergoing fitness testing.

The Canadian Heart Foundation's Committee on Exercise Testing and Exercise Programs to Improve Cardiopulmonary and General Physical Fitness has made the following recommendations regarding physician involvement in cardiopulmonary fitness testing:

(a) All persons with known or suspected heart disease should have medical supervision for exercise testing.

(b) Exercise tests should be carried out by trained qualified paramedical personnel.

(c) For exercise tests in subjects over 30 years of age, continuous electrocardiographic monitoring is required and a defibrillator and other safety devices should be available.

(d) Exercise tests of well persons under 40 years of age may be carried out in total by trained paramedical personnel.

(e) Exercise tests for well persons over 40 years of age, who have had prior medical clearance including history and physical examination by a physician, may be carried out by qualified paramedical personnel within a suitable medically supervised exercise program.

(f) Paramedical personnel should utilize electrocardiograms for monitoring purposes and measurement of heart rate. Suspected electrocardiographic abnormalities and other unusual responses such as abnormal blood pressure changes should be referred back to the subject's physician.

A useful patient classification chart could feature the following categories:

Category I Well persons under 40 years of age.

Category II Well persons over 40 years of age.

Category III Persons of any age with primary risk factors (hyperdipidemia, hypertension, cigarette smokers), or with secondary risk factors (family history, obesity, physical inactivity, diabetes mellitus, or asymptomatic hyperglycemia).

Category IV Persons with known coronary disease.

Individuals in *Categories III* and *IV* will require physician supervision, which will add substantially to the cost of the test. How is this cost to be met? Two options are available.

The cost (physician's services range from $30 to $70+ per hour) may be paid directly by the patient. The onus is then on the patient to obtain reimbursement from his/her health insurance plan, assuming such tests are covered by the plan.

Alternately, OHIP coverage may be used to meet the cost of a stress test if the test is requested as part of a total health appraisal.

Strength and Muscular Endurance Tests

Strength and muscular endurance measurements of the abdomen and lower back and the upper body are of prime consideration for adult groups. A measurement of strength is represented by the maximum amount of force that a muscle can generate in a single contraction. Musucular endurance tests measure the ability of a muscle to develop forceful contractions over a period of time.

Strength Measurements

The strength of the abdomen and lower back can be measured by using the *abdominal flexion test* and the *back extension test* (see Resource #2).

Grip strength is often measured but the value of this type of test (see Resource #2) is questionable. Grip strength is not a good indicator of total body strength: generally, the larger the person, the greater the grip strength. Grip strength scores may be useful to determine if there are any major bilateral strength differences. They are also valuable for anyone involved in a racquet-oriented sport.

Muscular Endurance Measurements

Sit-ups (no./min.) are often used to determine the endurance of the abdominal muscles (see Resource #2). Precaution should be taken when administering these tests to very sedentary individuals or those with back problems.

Push-ups (no. of continuous repetitions) are often used to determine the strength of the upper body (see Resource #2). These tests may also be contraindicated in sedentary individuals.

Another option available for testing strength and muscular endurance is the use of a universal gym for testing the upper body pulldown and bench press) and the lower body strength (knee extension and knee flexion).

If athletes are being tested of if testing is part of a rehabilitation program, a cable tensiometer or an orthotron are invaluable.

Costs for a comprehensive strength-testing package are high, as this type of testing calls for expensive equipment and qualified personnel.

Flexibility

A measurement of flexibility is specific to the particular joint being tested. Flexibility may be defined as the range of possible movements in a joint or a series of joints. The range of joint action is dependent on ligaments, connective tissue, joint structure and muscle extensibility.

The standard flexibility measurement utilized for adult groups is the modified *Wells and Dillon "sit and reach" test* (see Resource #2; see also the Appendix for apparatus design). This test measures the flexibility of the lower back and the backs of the legs. Other flexibility tests that are specific to various joints, e.g., shoulder and ankle joints, are available, but are not particulary useful in adult fitness programs.

Anthropometry

The determination of percentage body fat and ideal body weight should be part of a fitness appraisal. Most people want to know what they should weigh. The two main options to determine ideal body weight are height/weight charts and skinfold measurements. Height/weight charts may be

applicable to the "average" person but do not make sufficient allowance for different somatotypes or people with high fat-to-muscle or muscle-to-fat ratios. Skinfold measurements are, therefore, most widely used to determine percentage body fat and ideal body weight. Various formulas are available to determine percentage fat (see Resource # 2).

Girth measurements may be useful for some individuals, especially in pre-test/post-test situations. The measurement of chest, abdomen and hip are often part of the test package (see Resource #2). Arm, thigh and calf measurements are also taken in some situations.

Respiratory Function

Some testing protocols include the measurement of vital capacity by means of a spirometer. Depending on the type of testing apparatus being utilized, timed vital capacity and peak flow rates and FVC/FEV 1.0 may be assessed.

Group Testing

Where numbers allow and time is not an important consideration, individual testing is preferable to the more impersonal group testing. However, as there are many circumstances where group testing is inevitable, what steps can the testing director take to make the experience a profitable one for all concerned?

When testing a large number of people a clinic or group approach is preferable. Although a larger staff will be required to carry out the testing program, if testing stations are established the subjects' can be routed from station to station quite quickly. In fact, group testing via this method can be accomplished in less time than individual testing.

Participants' sensitivities must not be overlooked in group testing situations. Private areas should be set up for conducting some of the measurement tests, for example, skinfolds, girth measure, and ECGs. Privacy is essential in situation where both men and women are being tested.

Vital though testing is to the ultimate success of the program, it must be borne in mind that timing could well be the more crucial element. If too much time lapses between the testing and the implementation of the program, your would-be participants may lose interest. And before your program even gets under way, you are face-to-face with a "drop-out" problem!

Educational Services

The presentation and explanation of the test results is a vital component of the testing/fitness program procedure. If handled properly, it can be invaluable as a motivational and educational tool.

If time and numbers permit, test results should be discussed privately with each participant. Unfortunately, while the individual approach is preferable, the high cost involved (each individual session lasts approximately 30 to 45 minutes) compels most testing directors to favour a group approach.

When presenting test results to a group the main concepts can be explained by the use of films, slides and discussion. Of course, all participants will receive a copy of their own test results. These group sessions generally occupy 60 to 90 minutes.

Participants who may have special problems such as extreme obesity, orthopedic difficulties or a cardiovascular condition require a personal feedback session and a much greater degree of ongoing personal involvement on an individual basis.

Follow-Up Testing

Testing should be an ongoing facet of the whole fitness program package.

Three to four months after the commencement of the program an initial re-test should be conducted. By this time a lot of the aches and groans associated with starting an exercise program should have disappeared and participants are starting to see and feel some of the beneficial effects of exercise. Positive results from a re-test should encourage this feeling of well-being, as well as motivating participants to continue their exercise program.

A yearly re-test is also recommended as part of the ongoing monitoring of participant ' progress. The results of such tests also indicate whether program adjustments are in order.

Re-tests may be booked in advance at the time of the last test. Alternately, individual participants may assume responsibility for booking their re-tests. The first option is preferable because it establishes a concrete time-frame. Unfortunately, as we all know, if people are left to their own devices in the matter of arranging appointments, they invariably forget to do so.

No matter what option is chosen, a reminder letter or phone call confirming the upcoming re-test date will help in the follow-up procedures.

Summary

Many different types of fitness testing programs are available. In opting for a particular test, it is important to assess both the needs of the particular group to be tested and the abilities and qualifications of the testing staff.

The test protocol itself will vary greatly depending on the age, fitness level, and objectives of those being evaluated. Equipment availability and the level of technical expertise of the testing staff also influence the choice of testing protocol.

The *Standardized Test of Fitness*, developed by the Ministry of State for Fitness and Amateur Sport, is an excellent base on which to build a fitness testing program.

Regardless of the protocols used in your fitness testing program, the following points should always be borne in mind:

- A fitness test is only one component of the total fitness program.
- For safety reasons (and to add to the program's credibility) medical guidance or consultation should always be an integral part of the testing program.
- Where a participant's safety is concerned, be conservative. *It cannot be stressed too strongly that if there is any doubt as to a participant's safety during a test, testing must cease.* A test can always be repeated.
- Immediate feedback concerning test results is important, otherwise participant interest in the fitness program will wane.
- A fitness test should be a relatively enjoyable learning experience, free from the regimentation and embarrassment that so often characterized participants' childhood experiences of physical fitness programs.

APPENDIX 1

HEALTH QUESTIONNAIRE

NAME _____ DATE _____

ADDRESS _____ POSTAL CODE _____

HOME PHONE _____ BUSINESS PHONE _____

OCCUPATION _____ MARITAL STATUS _____

DATE OF BIRTH _____
day/month/year

HEALTH INSURANCE NO. (OHIP, QUEBEC) _____ INITIALS _____

PROVINCE _____

REASON FOR SEEKING MEDICAL OR PARAMEDICAL SERVICES _____

FITNESS TESTING _____ FITNESS PROGRAM _____ REHABILITATION PROGRAM _____ OTHER _____

NAME AND ADDRESS OF PERSONAL PHYSICIAN _____

_____

The following information is required to assess your physical fitness level and to establish your exercise program and/or physiotherapy program. Your health questionnaire and test results are confidential and will be released only with your written approval.

1. MEDICAL HISTORY
Have you ever had or are presently suffering from any of the following health problems?

	YES	NO	If yes to any of these conditions, please describe briefly
Heart Disease	___	___	_____
Rheumatic Fever	___	___	_____
Angina (Chest Pain)	___	___	_____
High Blood Pressure	___	___	_____
Varicose Veins	___	___	_____
Asthma	___	___	_____
Emphysema	___	___	_____
Epilepsy	___	___	Physician Comments: _____
Arthritis	___	___	_____
Diabetes	___	___	_____

MEDICAL HISTORY (cont.) YES NO

Bone or Joint Problems (e.g. ankle, knee, shoulder)	____	____	_____
Muscle or Tendon Problems	____	____	_____
Back or Neck Pain	____	____	_____
Poor Eyesight	____	____	_____
Hard of Hearing	____	____	

a. Have you had any surgery? YES _____ NO _____

If yes, briefly describe _____

_____

Physician Comments _____

_____

b. Are you presently taking any medication? YES_____ NO _____

If yes, sepcify _____

Physician Comments _____

_____

c. Have you been under a doctor's care for any reason during the past year?

YES _____ NO _____

If yes, describe _____

_____

Physician Comments _____

_____

d. When you exercise (e.g. climb stairs, walk, shovel snow), do you experience any of the following:

	YES	NO	If yes to any of these conditions, please describe briefly
Shortness of breath	____	____	_____
Leg Cramps	____	____	_____

	YES	NO	
Dizziness	____	____	_____
Headaches	____	____	_____
Coughing	____	____	_____
Swelling or Discomfort in Joints	____	____	Physician Comments: _____
Pain in Chest	____	____	_____
Shoulders	____	____	
Neck & Jaw	____	____	_____
Lower Back	____	____	

2. **PREGNANCY AND MENSTRUATION**

Pregnancy: Number of pregnancies _____ Number of Full Term _____
Number of non-full term _____ Date of last pregnancy _____
day/month/year

Time interval between pregnancies _____

Complications	YES	NO	If yes to any of these conditions, please describe briefly:
Morning Sickness	____	____	_____
Toxemia	____	____	_____
Hypertension	____	____	_____
Multiple Pregnancies	____	____	_____
Labour Problems	____	____	_____
Low Back Pain	____	____	_____
Joint Pain	____	____	_____
Sciatica	____	____	_____

Physician Comments _____

_____

_____

MENSTRUATION

Do you have:	YES	NO	If yes to any of these conditions, please describe briefly:
Irregular Cycle	____	____	_____
Excessive Bleeding	____	____	_____
Low Back Pain	____	____	_____
Excessive Water Retention	____	____	_____
Dizziness	____	____	_____
Nausea	____	____	_____

Physical Activity during menstruation: Normal _____ Less _____ None _____

Menopause: Are you presently going through menopause? YES _____ NO _____

Have you completed menopause? YES _____ NO _____

Briefly describe complications, if any _____

_____

_____

Physician Comments _____

_____

3. **FAMILY HISTORY**

Has anyone in your family suffered from any of the following conditions?

	YES	NO	If yes to any of these conditions, please describe briefly:
Heart Disease	____	____	_____
Stroke	____	____	_____
High Blood Pressure	____	____	_____
Diabetes	____	____	_____
Nervous Disorder	____	____	Physician Comments:_____
High Cholesterol	____	____	_____
Arthritis	____	____	_____

4. SMOKING AND ALCOHOL

a. Do you smoke cigarettes? YES _____ NO _____
Number per day _____ Number of Years Smoked _____

b. Do you smoke cigars? YES _____ NO _____
Number per day _____ Number of Years Smoked _____

c. Do you smoke a pipe? YES _____ NO _____
Amount smoked _____ Number of Years Smoked _____

d. If you have stopped smoking, how long ago did you quit? _____

e. Do you consume alcoholic beverages? YES _____ NO _____

f. If yes, do you consume alcoholic beverages
Monthly _____ Weekly _____ Daily _____

5. NUTRITIONAL HABITS

a. Do you regularly eat:

	YES	NO
Breakfast	____	____
Lunch	____	____
Supper	____	____
Snacks	____	____

b. Do you diet? YES _____ NO _____
If yes, why? Weight loss _____
Medical reasons _____ Other _____

c. Do you feel your dieting is successful?
YES _____ NO _____

6. PHYSICAL ACTIVITY

a. Do you exercise regularly now? YES _____ NO _____
If yes, how many munutes per day? _____ Sessions per week _____

b. Describe briefly the type of physical activity you take part in: _____

_____

_____

c. If you do not exercise now, have you ever been involved in an exercise or sports program? YES _____ NO _____

If yes, how long ago? _____

Describe: _____

_____

d. Why did you stop exercising? _____

e. Are you physically active with your job? YES _____ NO _____

If yes, describe _____

f. Do you have any of the following problems either during or after your exercise program?

	YES	NO	If yes to any of these conditions, please describe briefly:
Chest Pain	____	____	_____
Shortness of Breath	____	____	_____
Coughing	____	____	_____
Muscle Soreness	____	____	Physician Comments: _____
Headaches	____	____	_____
Diziness	____	____	_____
Pain in Arm	____	____	_____
Shoulder	____	____	_____
Neck or Jaw	____	____	_____

7. Describe briefly what type of programs you wish to become involved in: _____

_____

_____

PHYSICIAN USE:

I certify that the above patient is capable of following a stress testing program, controlled exercise program and/or physiotherapy program. I would recommend the following:

Stress Testing:
- Direct Physician Supervision _____
- Indirect Physician Supervision _____
- No Physician Supervision Necessary _____

Program:
- Individual or Medically Supervised _____
- Group Supervision _____
- Occasional Supervision _____
- Unsupervised _____

Recommendation for further tests _____

_____

_____

COMMENTS _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

PHYSICIAN _____ DATE _____
day/month/year

APPENDIX 2

FITNESS TESTING EQUIPMENT

(i) Basic Testing Equipment

Bicycle Ergometer (Monark)

Skinfold Calipers (Harpenden)

Stoelting Hand Dynamometer

Sphygmomanometer

Stethescope

Metronome - Electric

Anthropometric Tape (Preston)

(ii) ECG Accessories

Single Channel with Scope (fading)
and Heart Rate Tachometer

Two Channel with Scope (non-fade)
and Heart Rate Tachometer

(Multi-lead monitoring possible)

ST -- Segment Computer

Treadmill (18-49/1-10 mph/0-40% elev)
(18-54/1-10 mph/0-25% elev)

Program Control (for treadmill)

(iii) Emergency Equipment

Defibrillator (without scope)
(with scope)

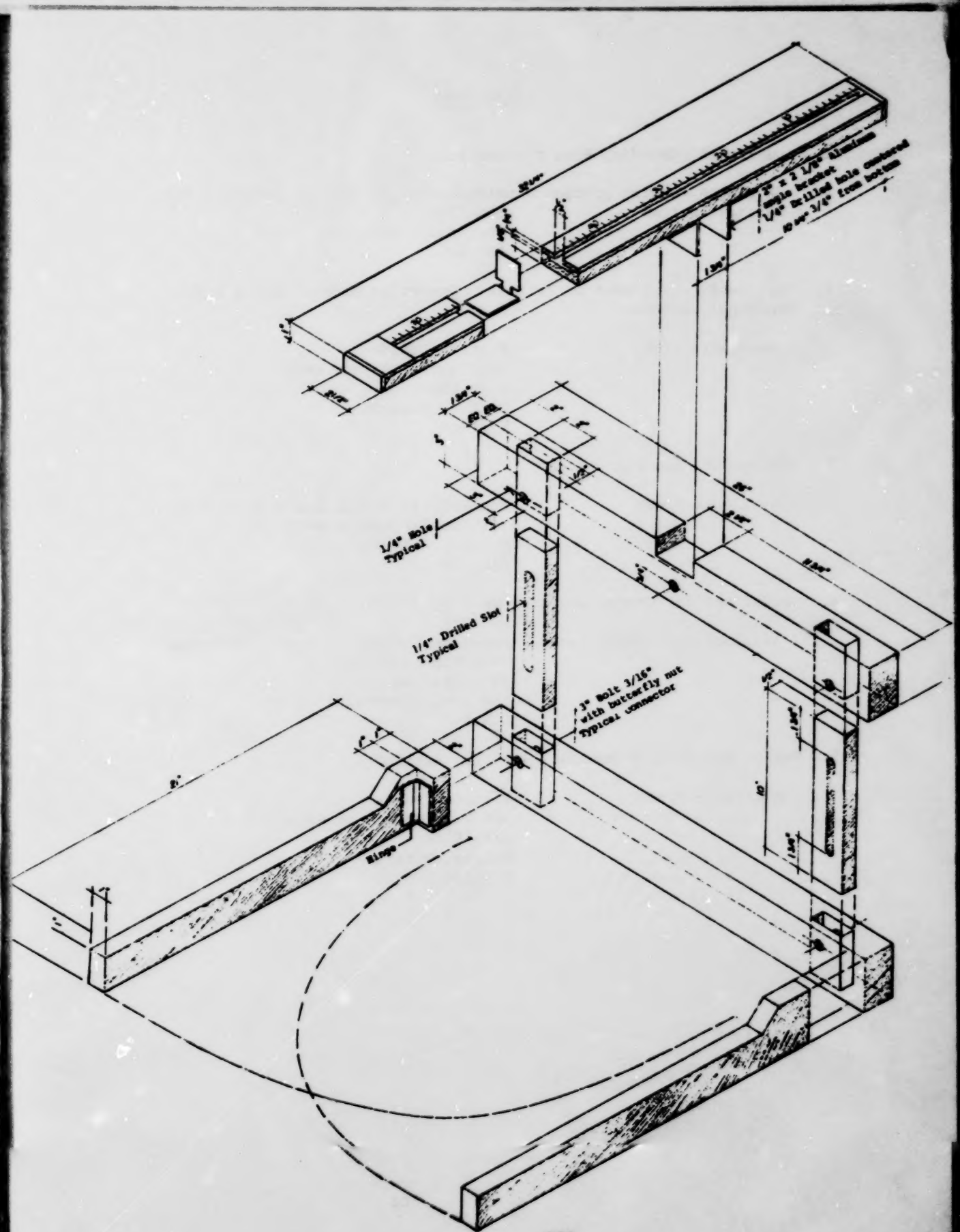
Oxygen (Oxy-Quick)

Ambubag

(iv) Miscellaneous Equipment

Electrodes, ECG Paper,

Electrode Jelly, ECG Mounting Paper


1/4" Hole
Typical
1/4" Drilled Slot
Typical
3" Bolt 3/16"
with butterfly nut
Typical connector
Hinge

Resources

1. *The FitKit (Canadian Home Fitness Test)*

   A simple testing procedure using music and steps. ($7.95 + tax).
   Available from: Box 5100
   Thornhill, Ontario
   L3T 4S5

2. *The Standardized Test of Fitness: Operation Manual, Norms and Percentile Scores*

   Available from: Fitness Canada
   365 Laurier Avenue West
   11th Floor
   Ottawa, Ontario
   K1A 0X6

3. *The Health Hazard Appraisal*

   Available from: Non-Medical Use of Drugs Directorate
   365 Laurier Avenue West
   Ottawa, Ontario
   K1A 1B6

4. *Guidelines for Graded Exercise Testing and Exercise Prescription*

   Available (at cost) from: American College of Sports Medicine
   1440 Monroe Street
   3018 Stadium
   Madison, Wisconsin 53706
   U.S.A.

5. *Health and Fitness Booklet* (by P.O. Astrand).

   Available from: Fitness Canada
   365 Laurier Avenue West
   11th Floor
   Ottawa, Ontario
   K1A 0X6

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Leadership

LEADERSHIP

Richard R. Danielson, Ph.D. and Karen F. Danielson, Ph.D.

Richard Danielson is involved in the physical education program at Laurentian University. Much of his research has been oriented toward the area of adherence to exercise programs. Karen Danielson has worked extensively in the field of fitness with both adults and children. She is currently engaged in full-time fitness consulting. Their perspective on leadership is derived from considerable participation in program development, coaching, and employee fitness program operations.

Leadership Theories

The linchpin of an employee fitness program is its leader. Totally committed to the program and its goal, a good leader can inject the enthusiasm and vitality necessary to stave off the creeping apathy that so often develops among participants in an employee fitness program.

Given the importance of good leadership to the overall success of a fitness program, the question arises as to what actually makes an effective leader. Over the years, many theories have been advanced to answer this question.

One school of thought holds that a good leader possesses certain personality traits — intelligence, self-confidence, adjustment, sociability, dominance, empathy — that enable the leader to influence others.

No one will argue that these traits should be part of a program leader's make-up, but surely they are not the sole key to understanding the leadership phenomenon.

In fact, the behavior theory of leadership maintains that the most important requirement for effective leadership is the leader's ability to display behavior appropriate to whatever circumstance he or she should happen to be in. Succinctly stated, it's not what you are but how you behave that determines the reactions of those you wish to lead.

The behaviorists identify two broad categories of behavior - consideration or relationship-oriented behaviors, and initiation or task-oriented behaviors.

By dispensing rewards and investing the fitness program with an agreeable social atmosphere, the leader's behavior is viewed as being consideration or relationship-oriented. Initiation or task-oriented behavior refers to the leader's activities in the areas of organization, direction, general control and attention to the physical effort which the program's participants must expend to attain fitness.

The behavioral theory of leadership, like the trait theory, addresses itself only in part to the problem of defining the effective leader.

Unfortunately, it does not take into consideration the fact that behaviors that are appropriate in one situation may be inappropriate in another.

Enter the proponents of the interactional theories school. Interactional theories, formed to counteract the deficiencies of the trait and behavioral models, are founded on an incorporation of the best points of the other theories.

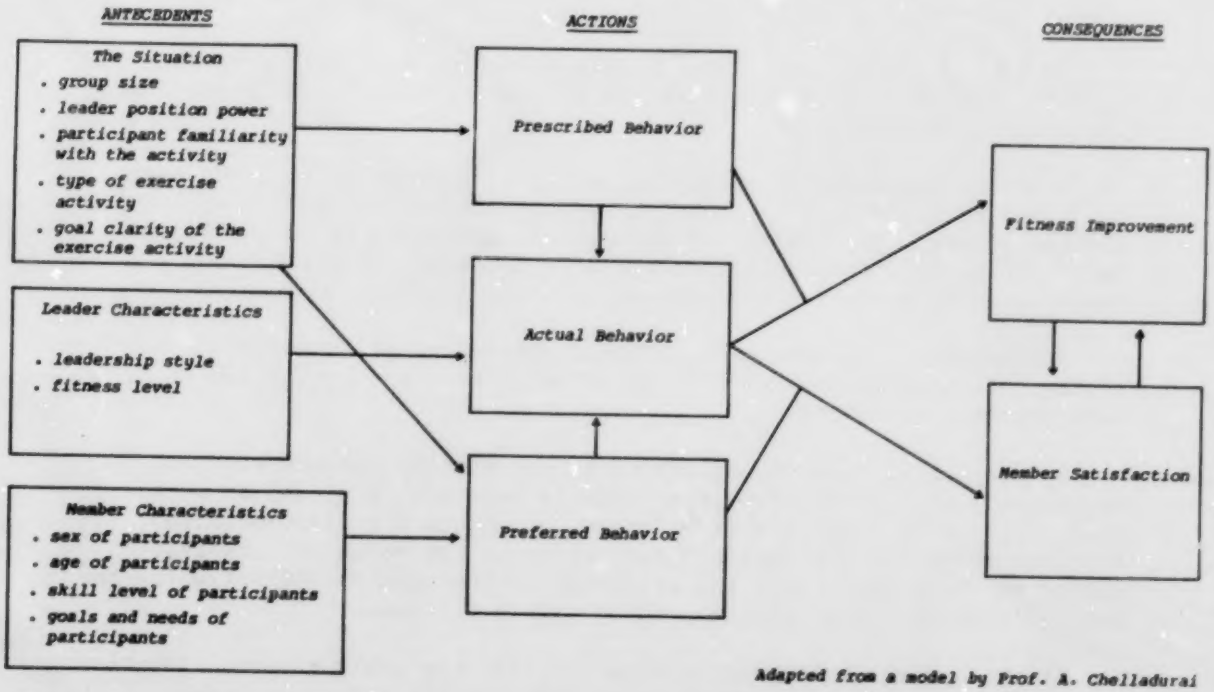
Effective leadership is now seen to be dependent on the joint interaction of the leader's personality and behavior with the needs of those who he or she is leading, taking into consideration the specific aspects of the given situation.

Let us apply one facet of the interactional leadership theory to an employee fitness program.

Interactional Leadership and the Employee Fitness Program -- A Model

Figure 1 depicts the interplay of all the components at work in the formulation of a basic leadership model, applicable to an employee fitness program.

A MODEL FOR LEADERSHIP IN EMPLOYEE FITNESS PROGRAMS



Adapted from a model by Prof. A. Chelladurai

The model demonstrates a known psychological reality, *i.e.*, that *all* behavior — and fitness leadership is no exception — can be broken down into (a) the conditions giving rise to behavior (Antecedents), (b) the behavior itself (Actions), and (c) the conditions determined by the behavior (Consequences).

Understanding the interplay of these components, and the effective utilization of this knowledge, are the keys to successful leadership.

ANTECEDENTS OF LEADERSHIP

The Situation

Figure 1 demonstrates that the situation is the first segment of the antecedent component of our leadership model. The term "situation" covers all those aspects of the program's physical and social environment that affect leader behavior, *i.e.*, size; the leader's position power; participant familiarity with the activity; type of exercise activity; and goal clarity of the exercise activity.

If we consider these variables individually, it will become apparent that each respective situation will elicit specific behavioral responses. These responses may be viewed as being examples of relationship-oriented behavior or as task-oriented behavior. (Re-enter the behaviorist school of leadership theory!) Table 1 lists practical examples of these two poles of behavior.

Of course, as our model is based on interactional leadership theory, neither broad class of behavior is the "right" behavior for a fitness leader. Rather, both types are appropriate in some situations, at some times, and with some people.

Table 1

EXAMPLES OF TASK AND RELATIONSHIP BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

TASK BEHAVIORS	*RELATIONSHIP BEHAVIORS*
. concentration on development of good training habits	. development of a strong *esprit de corps*
. concern about efficient utilization of time	. concern about integration of new members into the group
. attention to record keeping	. attention to extra-curricular social activities

TASK BEHAVIORS	*RELATIONSHIP BEHAVIORS*
. high level of leader input in exercises performed (e.g.) setting of tempo, style, etc.)	. rewards and punishments given according to participant's social performance in group
. rewards and punishments given according to participant's physical performance	. performance of personal favors for participants
. asking for more work than the participants can do	. giving of personal attention to members who seem neglected
. emphasis on the quality of training	. provision of means for participants to communicate with each other
. maintenance of definite standards of performance	. awareness of conflicts in the group
. pressure on participants for greater effort	. encouragement of participants to work together
. unilateral decisions on what should be done and how to do it	

Group Size

Generally speaking, the larger the group, the more structured the leader's behavior. Unfortunately, as group size increases, opportunities for the instructor to give individual attention or to allow group members to share in leadership decisions decrease.

Logistics force the instructor to take charge and to devote most of his or her attention to organization efficiency. Nowhere is this more apparent than in large group-exercise programs.

It follows, then, that a leader's behavioral style when working with a small group of 2 to 10 joggers, will differ markedly from behavior exhibited when working with a large group exercise class consisting of 20 to 40 people.

Leader's Position Power

People are accorded power in their positions for different reasons. Power may be acceded to the occupant of a certain position because the position holder is perceived to be a dispenser of rewards.

Conversely, power over others can be wielded through coercion or denial. (This coercive power also involves control over rewards.)

Legitimate power is accorded to the occupant of a formal office that is itself perceived to represent power.

Those whose knowledge is superior to others in the group wield power by way of their expertise.

Finally, an individual can be well-liked by group members, and, as a result, be allowed to exercise more power over the group, *i.e.*, to exercise referrant power.

What type of power do fitness instructors wield vis-à-vis fitness program participants? To answer this question we must first consider the different types of fitness leaders. As Table 2 shows, a voluntary leader drawn from the same or lower occupational group as the participants will be considered differently by them than a volunteer leader who possesses higher occupational status than they do. Similarly, participant acknowledgement of a leader's power will differ for a paid leader coming from outside the company, and a paid leader with a permanent position within the company *i.e.*, a full-time fitness director.

What emerges from Table 2 is an apparent power continuum that goes from low, for a voluntary leader from the same occupational status as the program participants, to high, for the full-time company fitness director. However, Table 2 also reveals that the person who ranks low in terms of legitimate power, for example, could rank highly in terms of referent power. Thus, such a leader could well have the same total power as a leader whose legitimate power is high, but whose referent power is low.

In general, though, we can conclude that as power increases it is easier to exercise leadership. Moreover, the greater the position power, the greater the likelihood for successful task-oriented leadership behavior.

Conversely, leaders with low position power, who, as a result, lack the means to ensure compliance with task-oriented leadership requests, will rely on the use of relationship-oriented leadership behavior. This is not a negative situation. It simply shows that different types of leadership behaviors are probably more appropriate in situations involving differing amounts of instructor position power.

Table 2

POWER AND ITS POSSIBLE RELATIONSHIP TO TYPES OF LEADERS

IN EMPLOYEE FITNESS PROGRAMS

AMOUNT OF POWER

TYPE OF LEADER	*REWARD*	*COERCIVE*	*LEGITIMATE*	*EXPERT*	*REFERENT*
VOLUNTARY - same or lower occupational status as participants	low or high, depending upon type of reward	low	low	low or high depending upon skill and/or fitness level	low or high
VOLUNTARY higher occupational status than participants	generally high, due to position in company	high, due to position in company	high, due to position in company	low or high, depending upon skill and/or fitness level	low or high
PAID LEADER from outside the company (e.g. fitness consultant)	low or high, depending upon type of reward	low	high	high	low or high
PAID LEADER from inside the company (e.g. full time fitness director)	generally high, due to position in company	generally high, due to position in company	high	high	low or high

Finally, while it is possible to predict, to a certain degree, the amount of coercive, legitimate and expert power possessed by a fitness program leader, it is impossible to measure referent power, and a significant amount of reward power. Both depend largely upon the leader/participant relationship. In the same vein, it is impossible to predict with certainty that paid leadership will result in a more effective program than volunteer leadership.

A happy compromise appears to be a combination of a small corps of paid fitness leaders with a large support staff of unpaid assistants.

Participant Familiarity with the Activity

Most Canadian adults have some familiarity with skating, hockey, swimming, basketball and football, as these sports have been part of school physical education programs for quite some time and are a part of childhood experience. And, with minimum prodding, most people are only too pleased to recall a Grade 8 "physical jerks" horror story with which to regale their fellow program participants.

Because of this activity familiarity and the often attendant conviviality, program participants tend to respond positively to leadership that emphasizes the social atmosphere. In this situation, therefore, interaction behaviors are generally more appropriate than task-oriented behaviors.

However, confront the same group with bicycle ergometers, weight machines, treadmills and other examples of contemporary physical fitness wizardry, and the reaction will generally be one of hesitancy and uncertainty. Under these circumstances, task-oriented leadership is called for.

Entirely apart from the safety aspect, the sheer novelty of the situation requires that the instructor provide the most efficient training assistance possible. Further, if participants are left to their own devices, it is quite likely that the stress of the new training situation can be enough to negatively affect performance, adherence, and, hence, fitness improvement.

This is not to say that relationship-oriented behaviors are out of place in such situations. On the contrary, it is important to create a relaxed group atmosphere in which mistakes and clumsiness are not threatening to the individual. (Shades of Grade 8 physical jerks!)

But it is important to develop skill level as quickly as possible, so that the new activity becomes a comfortable part of the participant's activity repertoire. Obviously, a fair amount of task-oriented leadership is necessary to achieve this goal.

Type of Exercise Activity

Team activities, such as basketball, that involve interaction among team members, require more directive, task-oriented behaviors than do individual activities, such as swimming or jogging.

In team activities, the instructor's prime objective is to have the team "play ball" as quickly as possible. Moreover, the numbers involved in team game activities call for the type of leadership that allows this objective to be met.

Once again, interaction-oriented behaviors are not precluded; it is simply that the situational demands of team activities limit the extent to which this behavior is appropriate.

Goal Clarity of the Exercise Activity

The final component in the leadership situation is the extent to which goals are built into activities.

Where participants and the instructor are equally aware of the goals to be achieved in a certain activity, the time line for their completion and the methods by which to achieve these goals, both can concentrate on the social aspects of the activity, as opposed to the task aspects.

But where this approach works well with jogging or swimming, in calisthenics, gymnastics and disco-fitness, for example, easily discernible feedback is not always forthcoming. Therefore, in these types of activities, the onus is on the instructor to provide definite task-oriented behavior that will help clarify the activity goal.

Leader Characteristics

We have seen that different situations affect leadership behavior. The personal characteristics of the leader also affect his or her responses to the employee fitness situation. Let us consider two ways in which leaders differ, and apply these findings to the employee fitness situation.

Leadership Style

Some leaders perceive task achievement to be the crux of the leadership function. Others prefer to concentrate on the fostering of smooth social relationships within the group. Obviously, task-oriented and directive leadership behaviors will be favored by the former, while the latter group will adopt a leadership style that leans heavily on behaviors that are interactive and socially oriented.

It follows that a good fitness leader should be able to identify the style of leadership with which he or she will be most comfortable. Moreover, as the manager of volunteer leaders, the fitness instructor should attempt to identify the volunteers' preferred leadership style.

Just as instructors should gravitate to those situations and programs that call for their particular style of leadership, so, too, should they ensure that their volunteers are placed in situations that will best complement their talents.

Fitness Level of the Leader

Unknowingly, program leaders can often contribute to a high drop-out rate, simply by basing their expectations on their own ability or fitness level, rather than on that of the program participants. To illustrate, what is submaximal for a leader can be maximal for the participants. This simple difference can cause participants to view the leader as being over-demanding.

A conscious awareness of this gap in fitness levels should be borne in mind by the leader when prescribing and executing exercise programs.

A solution to this negative situation would be to match, as closely as possible, the fitness/ability level of the leader with that of the participants. In this way, the leader would be able to identify with the exercise-related problems of the participants, who, in turn, would have a realistic fitness model against which to measure their own status, performance level and improvement. Unfortunately, this solution is really only workable in small, homogeneous group situations.

Member Characteristics

Differences in characteristics and instructional styles among leaders are matched only by the diversity that exists among the participants.

Sex of the Participants

From their earliest years, males have been encouraged to participate in physical activity. However, while their brothers ran, jumped, swam and played team sports, girls were often discouraged from participating in similar activities.

This retrogressive pattern of female socialization can not be undone overnight. As a result, a fitness leader of a female group should consider under-emphasizing vigorous activities during the *initial* phase of the program, in favour of the more social components of the program.

Interestingly, where groups are comprised of both males and females, the leader can well find that behaviors perceived by an all-male or

all-female group as being too task-oriented or too-relationship oriented, are found by a mixed group to be "just right" - a situation which is "just right" for the instructor, too!

Once again, it is important to stress that the perception of over-emphasis on one behavior at the expense of another can be sufficient to affect program adherence.

Age of the Participants

As a general rule, the older the participants, the more individual the program should be. Leadership behavior should also be more relationship-oriented than in programs with younger participants.

As people age they tend to become more autonomous in their interests, and, as a result, do not respond as well to group programs as do individuals in their early twenties. Of course, this does not mean that all exercise activity for those over 25 must be conducted individually, but it is important that the age differences among participants be considered when conducting group activities.

What are the implications of age variables for leadership behaviors?

It has been found that relationship-oriented consideration behaviors are well suited to groups whose members have clearly defined fitness goals. The instructor's role in these circumstances is to reinforce the activity of the participant and to facilitate his/her training (e.g., an independent exercise activity program, based on a fitness test.)

Skill Level of Participants

The higher the level of an individual's skill, the less need there is for directed or task-oriented leadership behaviors. These behaviors are more appropriate for those less experienced members who lack a sense of direction.

When interacting with individuals who have already acquired considerable skill in a particular activity, tact is the fitness instructor's byword, especially when instructing these individuals in new activities. Relationship-oriented behaviors across all situations are decidedly more appropriate than task-oriented behaviors.

Goals and Needs of the Participants

Many people embark upon a fitness program with high hopes and no goals. All too soon these individuals become drop-out statistics.

Goal setting is a vital motivational force. As a result, the onus is on the instructor to both recognize the participants' physical fitness needs, and to assist them in setting fitness goals that are commensurate with those needs.

Actions of Leadership

We have seen that the action of leadership behavior is influenced differently by the three antecedent conditions -- situation, leader characteristics, member characteristics -- and their components. (Figure 1 graphically demonstrated the effects of these antecedent conditions on the action of leadership behavior.)

In short, a fitness program leader's *actual* behavior is (a) *prescribed*, in part, by the situation; (b) is a response to behavior *preferred* by the participants, and finally, (c) is indicative of behavior that is inherently *satisfying* to the instructor personally.

Given this dichotomy, are there any specific behaviors that can be prescribed for a particular situation?

No, there aren't; however, the following points do present some valid hypotheses for appropriate leadership behavior in certain situations.

- When the specific situational demands are strong, all instructors will tend to behave as per the prescriptions of the situation.
- When the specific situational demands are weak, or perceived to be weak, the instructor who understands the preferences of the participants will modify his/her behavior to reflect these preferences.
- Where the instructor does not clearly understand the preferences of the participants, his/her behavior will tend to reflect personal preference.

Consequences of Leadership

The leadership model illustrated in Figure 1 shows that satisfaction and fitness improvement are the two main obvjectives of a fitness program. They are, therefore, also the two main consequences (goals) of leadership.

Obviously, one sub-goal common to both goals is continued participation. If a participant does not come regularly to the program, his/her fitness level will definitely not improve. And, as a corollary, certain personal needs of the participant will not be satisfied.

While the existence of these goals is not disputed, prioritization of goals is a helpful tool if their achievement is to be met.

At times both goals are of equal importance. On other occasions, concern for fitness improvement must supersede employee satisfaction, and vice versa. In any event, the goals are separable, and require different emphasis at different times.

Let us consider goal prioritization as it is established in a three-month fitness program. (Three to four months is a conventional time

frame for many company fitness programs, as it coincides with seasonal changes and allows for program variety.) In such a program there are three phases: the beginning phase, the training phase, and the maintenance phase.

Table 3 details the changing goal priorities, and the reasons behind these changes, in our typical three-month program.

Table 3

PHASE	*PRIORITY*	*REASON*
1. Beginning phase	#1 - Satisfaction #2 - Fitness improvement	Once the decision has been made to begin a program, it is important that participants form habits that will increase their activity level. If the program is not enjoyable, participants will not attend frequently enough to change their habits. Also, too much concern for fitness improvement goals can lead to over-exercising, sore muscles, injuries, etc.. These negative consequences can prevent an individual from attending frequently enough to establish beneficial habits.
2. Training phase	#1 - Fitness improvement #2 - Satisfaction	Once the habit of regular exercise is strong enough to maintain participation, it should be followed by a period in which there is sufficient activity to cause a *measureable* and *noticeable change* in fitness levels. A participant may be prepared to wait one month for a significant loss of weight, but will, at some point, (e.g., two months), evaluate the program to determine whether his/her inital goals are actually being met. An increased fitness level leads to increased satisfaction; and one of the main motivational objectives in the program is to provide successful experience.
3. Maintenance phase	#1 - Fitness improvement #1 - Satisfaction	Once proper lifestyle habits have been formed and fitness objectives have been at least partially met, concern about the exercise intensity can be moderated. It is at this point that fitness improvement and satisfaction of personal needs are given *equal* priority.

Fundamental Requirements for Fitness Leadership

Table 4 lists some of the many requirements necessary for the development of a good fitness leader.

It will be evident from Table 4 that the development of a good fitness instructor is a rather long-term process. Obviously, much of the training outlined in Table 4 is only appropriate for individuals planning a career in fitness and lifestyle improvement.

Table 4

SOME NECESSARY REQUIREMENTS FOR EFFECTIVE LEADERSHIP IN EMPLOYEE FITNESS PROGRAMS

REQUIREMENT	*HOW TO OBTAIN IT*
Academic Knowledge	
1. (A) The Human Body and its Physiological Function . basic physiology . exercise physiology . tests and measurements . stress testing procedures . health principles (nutrition, smoking, stress, alcohol)	. university undergraduate degree programs and courses in physical education . Ontario Level I Fitness leadership course
(B) The Human Body and its Psychological Function . basic psychology . social psychology . sport psychology . motivation psychology . learning psychology and behavior modification	. university undergradate degree program and courses in physical education, psychology
2. Exercise Programming . adult learning principles . relaxation training . training for muscular strength and endurance . jogging . group exercises . use of music . training for flexibility . sports as training program	. university undergraduate degree program and courses in physical education . special clinics offered by Y.M.C.A.'s, community colleges, sport governing bodies . subscription to journals (e.g. *Action BC, AAFDBI,* coaching association)

. special training programs (e.g. handicapped, cardiac and elderly)	. use of computer assisted searches (e.g. Sports Information Retrieval Center)
3. Program Organization	
. philosophy of fitness (e.g. emphasis on demedicalization of health, self health	. university undergraduate degree program and courses in business
. leadership theories	. special management seminars offered by universities, community colleges, companies
. marketing techniques	
. organization principles	
. facility design	
. finances	. subscription to journals and management improvement newsletters
. communication principles	
. program evaluation techniques	
Practical Skills	
. first aid	. St. John's Ambulance
. cardiopulmonary resuscitation (CPR)	. CPR courses
	. university/college courses, seminars
. ability to prepare reports, briefs and submissions	
. counselling skills	. university/college courses
. accounting skills	. university/college courses
. equipment and facility maintenance skills	. special clinics (Y.M.C.A. community)
. athletic rehabilitation skills	. Ontario Athletic Therapist Clinics, University/college courses
Personal Qualities	
. sense of humor	. outside reading, self-improvement clinics, personal fitness and life-style program
. empathy	
. optimism	
. personal fitness	
. determination	
. patience	
. personal organization	
. consideration	

But what of the fitness instructor who wishes to improve both his/her personal leadership skills, and those of the program's volunteer assistants? The following are some techniques for more effective leadership.

Effective Leadership Techniques

According to current leadership theory, leadership can be improved if the leader changes to meet the demands of a given situation. Conversely, leadership can also be improved if the situation is changed to meet the specifications and style of the leader. Let us first consider the former tactic.

The Fitness Instructor

In order to improve his/her leadership techniques, the instructor must be willing to take personal steps toward change.

To be sure, a fitness instructor must be able to identify relevant personal goals, to design an incremental reward system that will aid the participant in achieving these goals, and to continuously monitor his or her progress. But just what goals should a fitness instructor set so as to ensure more effective leadership?

What to do.....	*How to do it.....*
. Give program participants and voluntary assistants a clear idea of what is expected of them.	. Explain the "whys" and "wherefores"; clarify; demonstrate; over-emphasize; set standards; invite questions.
. Let participants and assistants know how they are doing.	. Use memos; bulletins; letters; visits; provide feedback and two-way communication.
. Apply rules evenly and consistently.	. Publish your policies, make them known.
. Adapt to new situations with changes that make sense.	. Anticipate change; communicate your ideas about change; act positively.
. Keep atuned to the functioning of the organization.	. Talk informally to employees about their functions and their problems.
. Be willing to take decisive action.	. Keep deadline decisions; assume decision-making responsibility.
. Be available and keep a high profile.	. Be visible; seek out people; talk with them.

Many of these steps for self-improvement are as applicable for the volunteer assistant as they are for the fitness instructor, and it is part of the leader's responsibility to assist volunteers to attain their full potential.

At this point, a brief digression into instructor/volunteer interaction is in order.

The Volunteer Assistant

To best aid volunteer assistants, a fitness leader should know and understand the nature of the satisfactions that are involved in voluntary work.

The volunteer instructor as a *leader* seeks the following satisfactions:

(a) power over others;

(b) satisfaction of status needs;

(c) promise of later personal rewards;

(d) personal interest in fitness; and

(e) more group acceptance.

As a *follower*, the satisfactions for the volunteer instructor are:

(a) the gaining of assistance from a perceived important person;

(b) vicarious identification with perceived important persons; and

(c) the satisfying of certain dependency needs.

Empathy and communication and the practice of the following common-sense techniques will do much to ensure the continued satisfying involvement of the program's volunteer assistants.

- Let the volunteer know exactly what is expected.
- Encourage give and take.
- Be human. Avoid overbearing behavior.
- Be generous with your time.
- Provide as many *AV* resources as possible.
- Repeat instructions, procedures and policies.
- Avoid personal criticism, sarcasm or wounding humor.
- Give and invite constant feedback as to volunteer's performance.
- Show that you are committed to providing help as soon as it may be needed.
- Try new ways of doing things.
- Make the volunteer's training experience as enjoyable for both parties as possible.

Changing the Situation

If it should prove impossible to change the person to meet the needs of the situation, consider changing the situation. This is not as difficult to accomplish as it appears to be at first glance. Merely utilize your knowledge of how the situation affects leadership, as well as your knowledge of the person in question - be it the fitness leader or a volunteer, and work from there.

Conclusion

The foregoing discussion has been an attempt to provide the theoretical and practical considerations relevant to psychological leadership in employee fitness programs. Given the diverse factors that are involved, and the complexity of some of the principles, as well as the ongoing research into the subject, it is obvious that this discussion is not *the* definitive statement on fitness program leadership. However, the authors are confident that the points covered will at least provide a sound basis on which to build improved leadership techniques.

Ongoing motivation

ONGOING MOTIVATION IN EMPLOYEE FITNESS PROGRAMMING

Richard R. Danielson, Ph.D. and Karen F. Danielson, Ph.D.

Richard Danielson is involved in the physical education program at Laurentian University. Much of his research has been oriented toward the area of adherence to exercise programs. Karen Danielson has worked extensively in the field of fitness with both adults and children. She is currently engaged in full-time fitness consulting and in research in the areas of fitness and lifestyle improvement and sport. Their perspective on leadership is derived from considerable participation in program development, coaching, and employee fitness program operations.

What is Ongoing Motivation?

One of the major contributors to the demise of an employee fitness program is the failure of the instructor to motivate the participants to remain active in the program, after their initial enthusiasm wears off. This serious problem can be overcome with the imaginative use of ongoing motivational techniques.

Ongoing motivation, then, is that elusive element that keeps a program vibrant and enjoyable, and, as a result, keeps the participants coming back for more.

Yet, although ongoing motivation remains a constant concern for a good fitness instructor, motivational responsibilities should gradually be passed from the instructor to the participant. This is in recognition of the universal human desire to control one's own life and well-being.

The following discussion concentrates on those ongoing motivational techniques that can be utilized to enable instructors and participants alike to achieve this goal.

Who Are We Motivating?

At first glance the obvious answer to this question is: the employee. However, as any individual employee is likely to respond to all manner of influence, both overt and covert, from family, friends and co-workers, these people should also be included in the instructor's schema for ongoing motivation. Let us now consider each of these groups in some depth.

The Employee

The prime candidate for ongoing motivation is the employee participant in the fitness program. A good instructor will strive to ensure that each participant receives the individual, interpersonal, group, and environ-

mental support needed to see him or her through this risky undertaking of trying to improve his/her lifestyle. And by risks we do not mean broken bones or sprained backs. Rather, we are talking about intangibles such as the time and energy that an employee must invest in a fitness program, possibly to the perceived detriment of other vital facets of his or her life. What are these vital facets that an employee considers when weighing the pros and cons of adhering to a regular exercise program?

For example, we all know that jobs generate money and status; families and peer groups provide an individual with security and support; and pleasure is available to all through a vast diversity of entertainment media. Because they are vital to our happiness and well-being, we devote much of our time to these elements.

Recognizing the importance of these needs to the individual, the fitness instructor's plans for ongoing motivation must ensure that as many of these needs as possible are met not only through the regular channels, but also through exercise.

The onus is on the fitness instructor to demonstrate that enhanced fitness means more energy and alertness, and hence better job performance. Point out that fit people are accorded more status in today'- health-oriented society, be it in social or business life.

Family, fellow workers and peers are more favourably disposed toward the individual who demonstrates a healthy sense of self-worth by being fit.

Prove to participants that fitness activities are fun and entertaining, with both long- and short-term benefits.

Above all, the good instructor should demonstrate that the degree of an individual's happiness and self-satisfaction depends, to a great extent, upon his/her general physical activity level -- and this requires fitness.

One important reason why embarking on a fitness program is often perceived as risky is the possible exposure to one of childhood's great anxieties, the fear of not winning, of being dubbed a loser.

It is sad but all too true that a large percentage of adults have been "turned off" sport and physical activity during childhood. Everyone seems to have learned one basic lesson from the school phys. ed. classes -- there is only one winner; all the rest are losers. Understandably, most people don't like to think of themselves in this light, so that most Canadians quit this competitive situation by avoiding sports.

Women, in particular, have to overcome not only this antipathy, but also an ingrained taboo against women participating in physical activity on the grounds of it being inappropriate feminine behavior.

And as every instructor who has ever conducted classes for older people knows, citizens of mature years consider physical activity, sports and games to be improper behavior for responsible adults. And they won't play.

All these powerful ingrained attitudes, no matter how ill-founded and untrue, must be overcome if the program's goals are to be met.

Finally, each participant is faced with the unpleasant possibility that maybe, or even probably, he or she will not be able to attain the goals he/she set upon entering the program.

The instructor must realize that if there exists even the remotest possibility of failure in the mind of the employee, then he or she is risking a loss of self-respect by simply beginning a fitness program.

It is imperative, therefore, to minimize the importance of possible failure in the mind of the employee, and maximize, through a sound motivational program, his or her chances of success.

The Employee's Family

An individual's family exerts an enormous influence on his/her behavior. In terms of a fitness program, this means that when an employee participates in a company fitness program, his/her family *must* support the program.

To accomplish this, the company offering the program, and the instructor-co-ordinator must take steps to ensure that family support of the participating employee is strong and positive. Motivational techniques can include the provision of company-sponsored child-care programs; social physical activities such as family cross-country ski parties; the use of communication devices such as a family-directed newsletter, coaching tips and participant "report cards".

The main point is to establish frequent communication regarding the participant's progress with his or her family, and to encourage the family to maintain its support of the participant.

The Employee's Peers

For all employees, in particular unmarried employees, the occupational peer group is a major provider of social support.

Entirely apart from its function as an informal critical audience of the employee's job performance, the occupational peer group influences such diverse activities as eating patterns, after-work socialization, and on-the-job personal habits. Considering this group in the design of an ongoing motivation program is obviously important.

The occupational peer group is often considered to be the sum of a number of individual employees, and by extension, it can be argued that techniques used with the individual should be transferable to the group. This concept is true in a limited sense, but as much research into group behavior indicates, a group is really more than the sum of its members. The group must, therefore, be considered as if it were another individual, and be treated accordingly.

If the fitness instructor keeps these points in mind, stressing group goal setting, encouraging friendly inter-group rivalry, and promoting group identification will all help improve both program cohesion and program adherence of individual members, and the group as a whole.

The Company

While more and more research is confirming the positive benefits that can accrue to a company from an employee fitness program, instituting such a program still represents a considerable gamble on the part of the company. It is important that this gamble be acknowledged.

The company must receive the same degree of encouragement for its efforts as do the employee, his/her family, and the occupational peer group. Indeed, from a time perspective, the company should be the recipient of the longest amount of attention from the fitness instructor and his/her committee.

It is essential to keep the company abreast of the doings of the fitness program. The preparation of regular progress reports, the formulation of short- and long-term plans, and the frequent evaluation of program effectiveness are a necessary price to pay for program survival. Programs that have no goals, and lack well-established evaluation procedures stand little chance of surviving in a business world that stresses corporate "fitness" in economic terms.

The importance of long-term motivation vis-a-vis the company cannot be stressed too strongly.

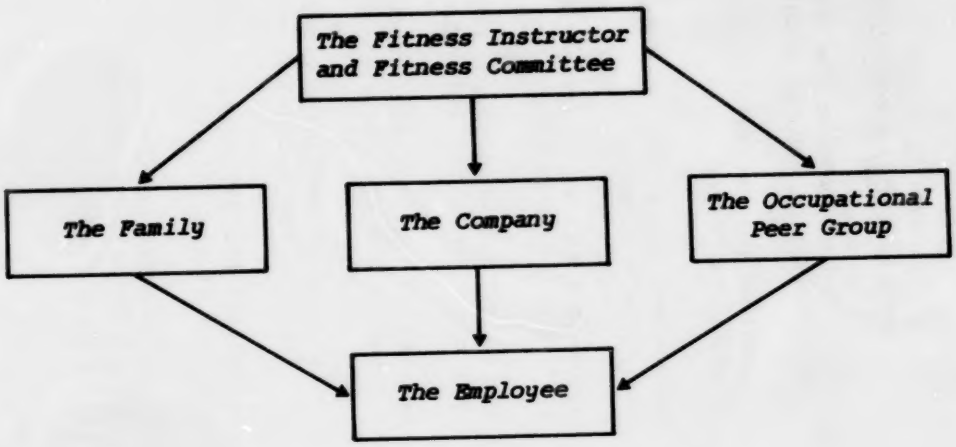
The Fitness Instructor

As the cornerstone of the entire fitness program, the fitness instructor must consciously implement procedures that reinforce his/her own efforts. He or she must personally practise ongoing motivation techniques.

Figure 1 summarizes the individuals and groups in need of ongoing motivation. It is apparent from Figure 1 that all channels of motivation influence are directed from the instructor to the employee, via the family, the company, and the occupational peer group. (The authors recognize that in any specific situation, additional channels between the five individuals/groups may surely be found.)

Figure 1

A MODEL FOR THE FITNESS INSTRUCTOR'S ONGOING MOTIVATION RESPONSIBILITIES IN AN EMPLOYEE FITNESS PROGRAM



Before considering some examples that meet the requirements of the various motivational channels shown in Figure 1, let us examine the goals that we are attempting to achieve in the three main stages of an employee fitness program.

What Are The Goals of Ongoing Motivation?

Without a clear idea of a program's goals, it is impossible for an instructor to measure the effects of his/her efforts towards ongoing motivation.

Fitness program goals can be divided into three categories: antecedent goals, action goals, and consequent goals. Antecedent goals are those that must be attained if the program is to be initiated successfully. Action goals, on the other hand, are goals that must be met so that the program can be run effectively. Finally, consequent goals refer to events that must happen if the program is to change and improve. Table 1 defines the three classes of goals, and outlines the actions necessary for goal accomplishment.

Table 1

A CLASSIFICATION OF GOALS IN EMPLOYEE FITNESS PROGRAMS

GOAL NAME	*GOAL DEFINITION*	*GENERAL GOAL REQUIREMENTS*
Antecedent Goals	. any goals which must be achieved in order to *initiate participation* in the program	. direct *contact* between the specific individual/group and the program . mechanisms for determining program *preferences* of the individual/group
Action Goals	. any goals which must be achieved in order to *maintain participation* in the program	. mechanisms for providing *support* to the individual/group . mechanisms for encouraging *discussion* by the individual/group . mechanisms for encouraging physical *participation* by the individual/group
Consequent Goals	. any goals which must be achieved in order to *change* or *improve participation* in the program	. mechanisms for providing program *information* to the individual/group . mechanisms for providing program *benefits* for the individual/group . mechanisms for determining program *problems* of the individual/group . mechanisms for determining new program *preferences* of the individual/group

Table 1 demonstrates that the three goals usually operate concurrently. To achieve this optimum state, the instructor must be attuned to helping new members achieve antecedent goals, while simultaneously ensuring that other individuals/groups are attaining action and consequent goals.

If we reconsider the three main motivational channels shown in Figure 1, it will be possible to formulate examples of antecedent, action and consequent goals for each of the possibilities suggested in Figure 1.

Table 2 provides a general idea of what should be happening at different stages of a successful program, *i.e.*, a program where the instructor practices ongoing motivation techniques through the company, the family, or the occupational peer groups.

Let us now look at the psychological principles operating in fitness programs, and determine how they can be used to improve ongoing motivation.

Psychological Principles Involved in Ongoing Motivation

A complex of needs, motives and incentives influences the motivational process. These important elements all warrant specific consideration.

Human Needs

For many years psychologists have proposed the existence of needs that are essential for the proper functioning of an individual. In this regard, *need* is the verbal representation of some force that organizes our perceptions, feelings and actions so as to correct an unsatisfying situation.

For example, you have just survived the late-night National News. All that gloom and doom has made you hungry. You need food. You think about a pizza: mentally savouring the pepperoni, the cheese, and countless delectable, fat black olives. You're quite sure it's all right to have a pizza -- just this once. You reach for the phone and call your local take-out pizzeria.....

Abraham Maslow has proposed a "needs" model that could well be utilized in motivating fitness program participants. Maslow's model is displayed in Figure 2.

Table 2

EXAMPLES OF ONGOING MOTIVATION GOALS IN EMPLOYEE FITNESS PROGRAMS

GOAL CATEGORY

Motivational Channel	*Antecedent Goals*	*Action Goals*	*Consequent Goals*
INSTRUCTOR COMPANY MANAGEMENT	. to have frequent management visits to the program and the facility . to have management participation on the fitness committee	. to have the fitness program included as a regular item on management committee meetings . to have ready access to small amount of funding for short range projects such as social events . to have management give frequent news releases to the general public as to the company's commitment to the program . to have management personnel join the program	. to have in existence a system for the provision of immediate feedback to the company as to current numbers of involved employees, group attendance records, employees' feelings about the program and the company . to have in existence a system for determination of monetary benefits of the program to the company (*e.g.* morale, absenteeism, productivity, personnel recruitment, personnel retention)
INSTRUCTOR COMPANY MANAGEMENT THE EMPLOYEE	. to have management provide information to the employee as to time, location duration and cost of fitness program	. to have management provide appropriate work schedule so that employee can take advantage of program . to have management provide appropriate fee schedule so that employee can take advantage of program	. to have in existence a system with which the employee can determine personal absenteeism, morale, and productivity in comparison with his/her previous records and those of other employees/ groups in the company
INSTRUCTOR EMPLOYEE'S FAMILY	. to have employee's family informed as to the existence of the program as well as time location, duration and cost	. to have the family participate in a program on an ongoing basis	. to have in existence a system with which the family can provide feedback to the instructor about the type and extent of program disruption of family schedules

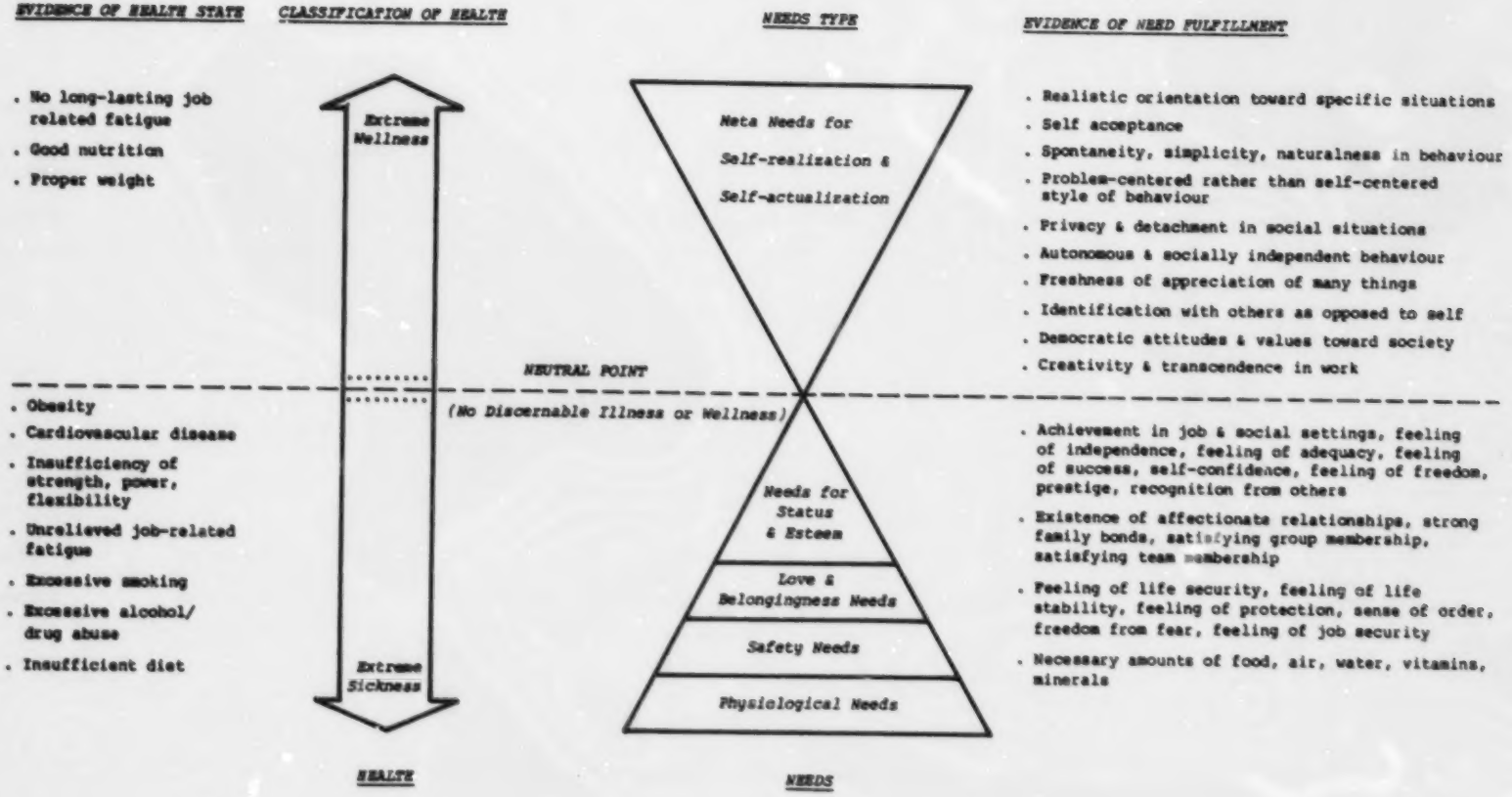
Table 2 (Cont'd.)

EXAMPLES OF ONGOING MOTIVATION GOALS IN EMPLOYEE FITNESS PROGRAMS

GOAL CATEGORY

Motivational Channel	*Antecedent Goals*	*Action Goals*	*Consequent Goals*
INSTRUCTOR EMPLOYEE'S FAMILY THE EMPLOYEE	. to have the employee informed about extent of family interest in his/her participation in the program	. to have the family provide appropriate time schedule so that employee can participate in the program	. to have in existence a system with which the employee can determine personal costs/benefits of program participation on family life (*e.g.* change in free time, change in interpersonal relationships)
INSTRUCTOR OCCUPATIONAL PEER GROUP	. to have occupational groups with similar interests identified	. to have work members attend as a group	. to have in existence a system with which the group can provide feedback to the instructor as to type and extent of program disruption of work schedules . to have in existence a system with which the group can indicate preferred changes in time, cost, frequency, duration, and activity type
INSTRUCTOR OCCUPATIONAL PEER GROUP THE EMPLOYEE	. to have the employee informed as to group preferences in program participation -- time, place, content, instruction, leadership	. to have the group encourage the employee to participate by assisting in sharing of work	. to have in existence a system with which the employee can determine change in status within the group as a result of program participation

MASLOW'S HIERARCHY OF NEEDS AND ITS POTENTIAL RELATIONSHIP TO HUMAN HEALTH


EVIDENCE OF HEALTH STATE
CLASSIFICATION OF HEALTH
NEEDS TYPE
EVIDENCE OF NEED FULFILLMENT
. No long-lasting job related fatigue
. Good nutrition
. Proper weight
Extreme Wellness
Meta Needs for Self-realization & Self-actualization
. Realistic orientation toward specific situations
. Self acceptance
. Spontaneity, simplicity, naturalness in behaviour
. Problem-centered rather than self-centered style of behaviour
. Privacy & detachment in social situations
. Autonomous & socially independent behaviour
. Freshness of appreciation of many things
. Identification with others as opposed to self
. Democratic attitudes & values toward society
. Creativity & transcendence in work
NEUTRAL POINT
(No Discernable Illness or Wellness)
. Obesity
. Cardiovascular disease
. Insufficiency of strength, power, flexibility
. Unrelieved job-related fatigue
. Excessive smoking
. Excessive alcohol/ drug abuse
. Insufficient diet
Needs for Status & Esteem
. Achievement in job & social settings, feeling of independence, feeling of adequacy, feeling of success, self-confidence, feeling of freedom, prestige, recognition from others
Love & Belongingness Needs
. Existence of affectionate relationships, strong family bonds, satisfying group membership, satisfying team membership
Safety Needs
. Feeling of life security, feeling of life stability, feeling of protection, sense of order, freedom from fear, feeling of job security
Physiological Needs
. Necessary amounts of food, air, water, vitamins, minerals
Extreme Sickness
HEALTH
NEEDS

The crux of Maslow's theory is that we all strive toward satisfaction of the highest possible strata of needs. However, before satisfying the higher need categories, we must first satisfy the lower categories of needs.

If Maslow's theory is correct, fitness intervention programs are likely to contribute to needs at the level that is comparable with love and belongingness, status and esteem. In outstanding fitness programs, the contribution will be to needs that are on par with the meta-needs of self-realization and self-actualization.

The pole to the left of Figure 2 represents a physiological conception of health. It is divided into two extremes - sickness and wellness. Note that the absence of sickness, a state that is sometimes referred to in medical terms as "good health", is really only a *lack* of sickness. It is not analogous to the state of wellness, represented at the upper end of the pole.

In light of Maslow's model, it can be argued that satisfying needs, up to and including those of status and esteem, can only bring an individual to a state of *absence* from disease - not to a state of *possession* of wellness.

The implications of Maslow's argument for fitness instructors is that in counselling and motivating participants to continue in fitness programs, we must convince them that an adequate salary, job security, a reasonable degree of job satisfaction, relative prestige, etc. are necessary, but not significant, conditions for a good life.

To all those instructors who, Maslow's model in hand, propose rushing out to win (and hold) vast armies of converts to physical fitness, we must sound a word of caution. Until basic lower-level needs, such as safety needs, are met, the odds are against the instructor in his/her taks of keeping people actively participating in fitness programs.

Good fitness programs are built on a stable psychological base. If the base is unstable, the program will fail. To put it bluntly, under the terms of Maslow's theory, the success of a participant's adherence to the fitness program may well be beyond the control of the fitness instructor.

Given this likelihood, is it worth the employee's while to embark on a fitness program?

Actually, there are two options available to employees in this situation. First, the employee can commence the program with the understanding that circumstances beyond his/her control, and that of the fitness instructor, may force the employee to terminate program participation early. The second option is more appropriate. The would-be participant would satisfy the relevant safety needs *before* embarking on the fitness program.

Attaining this goal usually requires joint consultation with the employee, his/her family, and, perhaps, company management. While this activity might appear to be out of the realm of a fitness instructor's normal responsibilities, a good fitness instructor should perceive this consultation as another step in the campaign to prevent the growth of drop-outs (or slide-outs) from the program.

It must be borne in mind that there will always be individual differences among employees in terms of the nature and importance of their needs. But, as instructors, we must be aware of the relative hierarchy of participants' needs, and their relationship to health and program adherence.

Motives

For our purposes, a "motive" is a tendency to either do something or not do it.

The relationship between motives and needs is such that the need identifies the psychological surplus or deficit, while the motive determines the strength of the tendency to either approach or withdraw from situations that will change the surplus or deficit. How can we apply this knowledge of the interaction between motives and needs to the fostering of ongoing motivation?

According to Maslow, people have "belongingness" needs. These needs can be met through participation in groups. The strength of the motive to join a group fitness program is, therefore, partly determined by how unsatisfactorily the employee perceives his/her belongingness needs are being met. (Obviously this is not the *only* need that causes an individual to join a fitness program.)

We would conjecture that belongingness needs are greater in unmarried, widowed or divorced employees. If this is so, a group program would probably be more attractive to this group than an individual exercise program. Again, if our conjecture is sound, the motive to join and remain in a group program in order to satisfy belongingness needs would be a prime factor in determining the success of this program.

Conversely, it could be said that an individual whose needs for belongingness, status and esteem are satisfied through his/her job, family, social and business activities, will have a much weaker motive for participating in a group program.

This is not to say that a group program including such individuals would be unsuccessful. However, the fitness instructor would be advised to stress a more individualized approach that holds out the promise of satisfying needs other than belongingness.

Incentives

The concept of incentives to increase productivity or sales, encourage behavior that benefits the company, or to improve job performance is well known to the business world.

Incentives work in business. They will also work in fitness programs. Why? The reason is simple. In our society, we act, to a very large extent, on the basis of conscious evaluations of what we do and what we expect to receive as a result of our actions.

In light of this elemental factor, the fitness instructor should determine the incentive value of two main segments of the program. In addition, the instructor must determine the following two incentive values for *each* participant.

1. The incentive value of the *type* of activity in satisfying the needs of each participant.

2. The incentive value of the *frequency*, *intensity* and *duration* of the activity in satisfying those same needs.

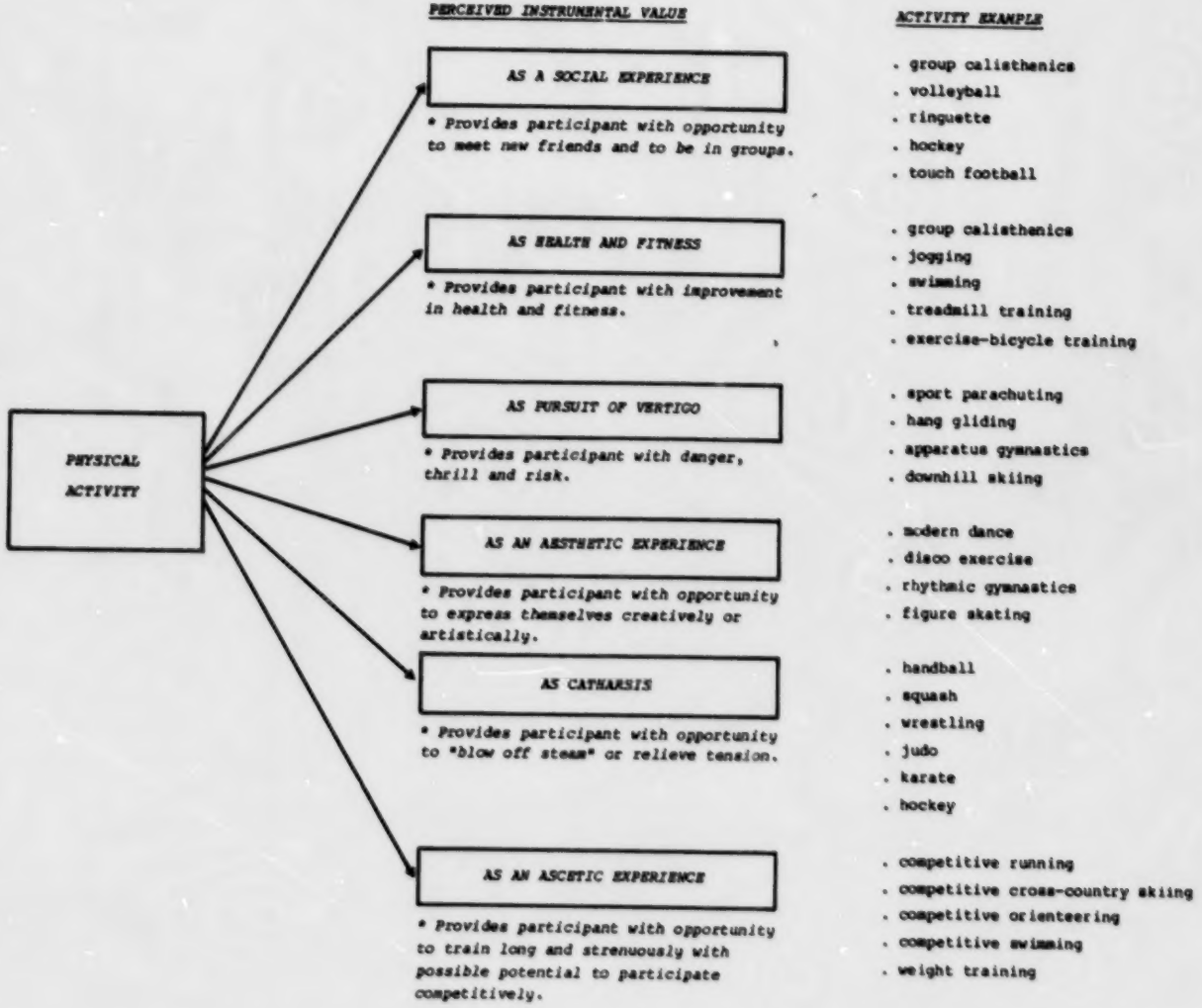
To determine the first requirement, we should consider why people participate in physical activity. Figure 3 illustrates six separate reasons proposed by Gerald Kenyon to answer this question. Kenyon's model also provides some activities that could correlate with each of the six reasons.

In Kenyon's model, the various categories represent what physical activity means to participants. Kenyon's model demonstrates that the greater the level of an activity's *perceived instrumental* value, the greater the *incentive value* of the activity. Most people hold the incentive value of physical activity as a social experience in high esteem. In other words, people participate in physical activity programs to gain friends and have a good time.

But what of those individuals who attach prime importance to physical activity as a means of meeting their health and fitness needs? How does an instructor cope when he/she has both categories participating in a fitness program? Obviously, their program expectations are quite different. The onus is on the instructor to meet the demands of this situation.

The instructor should enquire of each participant as to the nature of their needs. Note each participant's behavior in response to different activities and exercises. This knowledge enables an instructor to make necessary program modifications so as to optimize the instrumental value of an activity.

THE SIX INCENTIVE SYSTEMS OF KENYON'S CONCEPTUAL MODEL OF PHYSICAL ACTIVITY


PERCEIVED INSTRUMENTAL VALUE
ACTIVITY EXAMPLE
PHYSICAL ACTIVITY
AS A SOCIAL EXPERIENCE
* Provides participant with opportunity to meet new friends and to be in groups.
. group calisthenics
. volleyball
. ringuette
. hockey
. touch football
AS HEALTH AND FITNESS
* Provides participant with improvement in health and fitness.
. group calisthenics
. jogging
. swimming
. treadmill training
. exercise-bicycle training
AS PURSUIT OF VERTIGO
* Provides participant with danger, thrill and risk.
. sport parachuting
. hang gliding
. apparatus gymnastics
. downhill skiing
AS AN AESTHETIC EXPERIENCE
* Provides participant with opportunity to express themselves creatively or artistically.
. modern dance
. disco exercise
. rhythmic gymnastics
. figure skating
AS CATHARSIS
* Provides participant with opportunity to "blow off steam" or relieve tension.
. handball
. squash
. wrestling
. judo
. karate
. hockey
AS AN ASCETIC EXPERIENCE
* Provides participant with opportunity to train long and strenuously with possible potential to participate competitively.
. competitive running
. competitive cross-country skiing
. competitive orienteering
. competitive swimming
. weight training

When using Kenyon's model, it should be mentioned that activities do vary inherently in their instrumental value potential. For example, while aerobic exercises performed on a treadmill do have some instrumental value potential for meeting social experience needs, they do not have nearly the potential instrumental value of strenuous group exercises for meeting these needs. However, armed with the knowledge of the participants' individual needs, the instructor can prescribe activity that inherently offers the maximum instrumental value benefit to each participant.

Supplementary to the subject of incentives, is the inter-relation of the concepts of frequency, intensity and duration.

There is considerable evidence to suggest that people respond differently to sensations, in particular, to pain. We are all quite aware that after a particularly strenuous workout we hurt. To our despair, the ache in our joints and muscles gets worse with the passage of time. Come Day Two or Day Three of the post-workout period, we are ready to swear off exercise for all time. Feeling flabby and unfit was never this bad!

And the worst is yet to come. According to our best understanding of the training effect concept, we should exercise three times per week, which means that our next day of torture arrives just when we are reaching gingerly for the linament!

Our aching limbs are an illustration of how exercise intensity can assume negative incentive properties. The fact that we hurt even once after a workout, leads us to *expect* that we will hurt after the next exercise session. The expectancy of pain acts as a negative incentive.

The concepts of frequency and duration are subject to the same law. Overly intense, too frequent and/or too long exercise sessions can, through the mechanism of expected pain, act as a negative incentive to exercise.

Fortunately, a positive incentive value for exercise type and exercise intensity/frequency/duration can also be established.

Determine the participant's priority of perceived values of exercise as outlined by Kenyon. Only then are you able to counsel the participant regarding the type of fitness activity most suitable for his or her needs.

During the beginning stages of an exercise program, it is wise to err on the side of intensity/frequency/duration underprescription, at the expense of overprescription.

Exercise-related pain is, of course, unavoidable, but, as we have demonstrated, its negative effects can be minimized.

Extrinsic Motivational Techniques

Fundamental to a discussion of extrinsic motivation is the notion that what we do depends, to a large extent, on how we have been rewarded or punished for similar behavior in the past.

In relation to a fitness program, we could say that previous rewards, e.g., enjoyable social interaction, for a particular behaviour, e.g., coming out to a fitness class, usually results in a repeat of the behavior -- coming back to the class. Previous punishments, e.g., ridicule, pain, injury, tend to discourage a repeat of the behaviour -- dropping out of the program.

The key to this equation is a clear idea of just which behavior is being affected. As Table 1 illustrated, in an employee fitness program there are at least three main classes of behaviorally defined goals: antecedent goals, action goals and consequent goals.

As fitness instructors, we would like to help employees achieve all three goals, but first it is essential to gain their interest in fitness, and develop their understanding as to why and how fitness can improve the quality of their lives.

Rewarding and Punishing Agents in Fitness Programs

Table 3 lists some examples of rewarding and punishing agents associated with fitness programs. Of course, once participants' different needs, motives, incentives, ages, personalities, sex, etc. is taken into consideration, it will be self-evident that what is a strong rewarding agent for one individual may not be so for another. The same holds true for punishing agents. Discovering the appropriate agents for each individual and group is partly a trial-and-error process

Table 3 illustrates another important fact about rewarding and punishing agents. Some agents are dispensed or controlled by the fitness instructor, some by the employee participant, some by those in daily contact with the employee (e.g., family, occupational peer group), and some by the company. Finally, the actual physical environment of the facility, the location, lighting, music, availability of showers, also acts as an agent of control, albeit an impersonal one.

To understand how to use rewarding and punishing agents to best advantage, it is well to consider first the basic mechanisms of both procedures.

Table 3

SOME EXAMPLES OF REWARDING AND PUNISHING AGENTS IN EMPLOYEE FITNESS PROGRAMS

	SYMBOLIC	*MATERIAL/PHYSICAL*	*PSYCHOLOGICAL*
Rewarding Agents	.badges	.money	.pats on the back
	.rings	.prizes	.encouraging words from the instructor
	.awards	.released time for exercise	.group/family recognition of any improvement
	.T-shirts	.assistance in costs of membership dues	.friendship
	.award of the month	.bonuses tied to fitness or miles run, etc.	.achievement of exercise objectives
	.lapel pins		
	.recognition as a member of a "special" club (e.g. Morning Madness Club, 1000 Mile Club)		.attention from either the instructor, company, peer group or family
Punishing Agents	.exclusion from special group events	.exercise pain, injuries	.ridiculing of performance by instructor, group family
		.cost, tuition clothes	.failure to achieve a fitness-related goal
		.time lost from the job	.family complaints about absence owing to program participation
		.extra physical effort required	.psychological fatigue in work due to overwork in the exercise program
		.physical fatigue	

Positive Reinforcement, Negative Reinforcement and Punishment

Figure 4 depicts the four possible results of administering rewarding and punishing agents in fitness programs.

Figure 4

EXTRINSIC MOTIVATION -- CAUSES AND EFFECTS

		TYPE OF REINFORCEMENT	
		Rewarding Agent	***Punishing Agent***
MEANS OF APPLICATION	***Presentation***	***Positive reinforcement*** **Behavior increases**	***Punishment*** **Behavior decreases**
	Removal	***Punishment*** **Behavior decreases**	***Negative reinforcement*** **Behavior increases**

Present a rewarding agent for specific behavior, and that behavior increases. Remove the agent, and the behavior decreases. The opposite is true with a punishing agent. Present the agent, and the behavior decreases. Remove it, and behavior increases.

Now let us go from the general to the specific. Table 4 indicates the interplay between fitness-related behavior and antecedent goals when various rewards/punishments are either presented or removed.

We can conclude from Table 4 that positive reinforcement, negative reinforcement and punishment are neither inherently good nor bad. Each procedure can result in behavior that either supports what we are trying to do, or opposes it. Therefore, each procedure is equally valued as a motivational technique.

While most instructors prefer to opt for positive reinforcement as a motivating technique, Table 4 demonstrates the possibility that positive reinforcement could become negative reinforcement or punishment if certain factors are not taken into consideration.

Further, if we believe our main function is to aid participants to improve their fitness lifestyle, we must be prepared to use techniques, such as negative reinforcement or punishment, in order to discourage behaviours that bar the achievement of that goal.

So far we have considered how extrinsic motivational techniques affect behaviors necessary for the achievement of antecedent goals. How do these techniques affect behaviors necessary for achieving action goals?

In setting action goals it will be recalled that we are attempting to design mechanisms that will maintain participation, provide support for participants and stimulate discussion about fitness.

Table 5 illustrates both the beneficial and the harmful effects of extrinsic motivational techniques on the achievement of the action goals. Again, it must be emphasized that no one form of motivation is appropriate for all situations.

When using extrinsic motivational techniques in designing fitness and lifestyle improvement systems, the complex combination of participants, situation and technique involved in a fitness program must be carefully analyzed and considered.

To conclude this section, some examples of the effects of positive reinforcement, negative reinforcement and punishment as an aid to achieving consequent goals are provided in Table 6.

Table 4

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING ANTECEDENT GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR COMPANY MANAGEMENT	*BEHAVIOR:* Instructor circulates memo to all levels of management expressing appreciation for generous support but does not identify key supporters. *RESULT:* Non-supporters are both free from responsibility and publicly praised for it. Hence they remain uninterested in the program.	*BEHAVIOR:* Instructor circulates mildly critical memo to specific members of management who have not shown any program interest in terms of visits, enquiries, etc. *RESULT:* Some previously uninterested management personnel will respond by coming out once or twice to see the program in operation.	*BEHAVIOR:* Instructor complains to visiting manager about a lack of management interest in the program. *RESULT:* The manager who makes the committee to at least visit the facility is expected to take the blame for others who have not visited, hence he/she does not come back.
INSTRUCTOR COMPANY MANAGEMENT EMPLOYEE	*BEHAVIOR:* Employee is given time off to attend program information seminar. *RESULT:* Employee attends seminar and becomes interested in attending program.	*BEHAVIOR:* Employee is given time off to attend program seminar under the condition that time missed must be made up after hours. *RESULT:* In order to avoid working after hours, employee does not attend seminar.	*BEHAVIOR:* Employee is required to do work of others if he/she does not attend seminar. *RESULT:* Employee attends seminar in order to avoid punishment/ extra work and may become interested in attending program.
INSTRUCTOR EMPLOYEE'S FAMILY	*BEHAVIOR:* At information seminar, emphasis is placed on need for participant to have will power and to "do it alone." *RESULT:* Family does not become involved in program.	*BEHAVIOR:* At information seminar, it is stressed that lack of family involvement will almost certainly guarantee failure of employee to "stick it out." *RESULT:* Family becomes involved so as not to become responsible for possible dropout problem.	*BEHAVIOR:* Married employee is invited to bring spouse to information seminar but timing requires extra transportation, baby-sitting and alterations in meal schedule. *RESULT:* Spouse does not attend seminar or become involved with program.

Table 4 (Cont'd.)

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING ANTECEDENT GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR EMPLOYEE'S FAMILY EMPLOYEE	*BEHAVIOR:* Preliminary questionnaire contains section for spouse re family activities, special interests, and problems. These are taken into consideration in design of employee's program. *RESULT:* Employee attends program as does spouse.	*BEHAVIOR:* Preliminary questionnaire contains section for spouse re family activities, special interests, special problems. These are not taken into consideration in design of employee's program. *RESULT:* Employee attends but only once due to family inconvenience. Spouse never attends.	*BEHAVIOR:* Preliminary questionnaire notes importance of family participation yet does not allow for any means by which family can express preferences. *RESULT:* Spouse will contact instructor or attend program in order to express family preferences.
INSTRUCTOR OCCUPATIONAL PEER GROUP	*BEHAVIOR:* Preliminary questionnaire requests group to indicate extent of interest in an information seminar but does not require group to state the date. *RESULT:* Group indicates interest but seminar does not materialize because of hazy time specifications. In the meantime, group interest diminishes.	*BEHAVIOR:* Group is informed of likely health hazards connected with particular job situation, work habits, personal habits and made aware of information seminar which will likely be of some help. *RESULT:* Group requests seminar at date and time convenient for most members.	*BEHAVIOR:* Group is criticized for poor job situation, work habits and personal habits and told to "shape up". No techniques are suggested nor seminar planned. *RESULT:* Group refuses to believe criticism and does not organize seminar.
INSTRUCTOR OCCUPATIONAL PEER GROUP EMPLOYEE	*BEHAVIOR:* Released time is offered to employees who volunteer to administer voluntary questionnaire and/or set up information seminar. *RESULT:* Employees and their immediate friends become involved with selling the program.	*BEHAVIOR:* Released time is not given to employees so that they can fill out a mandatory questionnaire. *RESULT:* In order to complete work, employees spend little or no time on questionnaire, hence do not become interested.	*BEHAVIOR:* Employees responding negatively to questionnaire are required to justify their reasons. *RESULT:* Employees consciously face issues related to non-interests and in doing so resolve the problems.

Table 5

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING ACTION GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR COMPANY MANAGEMENT	*BEHAVIOR:* In all program reports to superior, instructor submits proposals or recommendations that benefit company image and require management ratification. *RESULT:* Fitness program is discussed frequently at management meetings and may be added as regular agenda item.	*BEHAVIOR:* Submitted fitness program reports, however frequent, always contain problems requiring management action. *RESULT:* Because reports always contain bad news and require management time, the less it is discussed at meetings the better. Therefore, management prefers no report and does not add fitness program as regular item.	*BEHAVIOR:* In order to reverse management disinterest, instructor submits controversial report highlighting gap between present management involvement and that of other related companies. *RESULT:* Management counters report through discussion at meetings and actual program involvement.
INSTRUCTOR COMPANY MANAGEMENT EMPLOYEE	*BEHAVIOR:* Instructor over-emphasizes the potentially positive job effects of joint employee-management participation. *RESULT:* Employees participate but only those who can potentially benefit from contact with participating managers.	*BEHAVIOR:* Instructor removes emphasis on employee campaign stressing job benefits of joint management-employee participation. *RESULT:* Managers attend due to lessened possibility of employee harrassment. Employees attend due to lessened chance of being considered by peers as "playing up" to management.	*BEHAVIOR:* Manager is forced to participate with employees. *RESULT:* Manager feels coerced to participate, therefore does so reluctantly and infrequently. Employees do not wish to be held responsible for manager's reluctant participation so they too either fail to begin to participate, or drop out.
INSTRUCTOR EMPLOYEE'S FAMILY	*BEHAVIOR:* Instructor provides inexpensive child care and youth activity programs for participating spouses. *RESULT:* Cost savings and ease of participation causes families to participate in the program.	*BEHAVIOR:* Instructor offers child care and youth activity program but offers no reduction for large families or for families which use the facility a great deal. *RESULT:* Large families tend not to participate and all user families limit extent of participation in order to keep costs down. Eventually they lose interest.	*BEHAVIOR:* Employees must pay monthly fee to use facilities but families can use facility without fee. Company's financial support is directly related to total number of monthly users, that is, the fewer the users the higher the fee to the employee. *RESULT:* Families use facility in order to reduce costs of employee.

Table 5 (Cont'd.)

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING ACTION GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR EMPLOYEE'S FAMILY EMPLOYEE	*BEHAVIOR:* Instructor offers increased number of programs for employees and their families but does not require minimum number of participants. *RESULT:* Participation increases due to increased number of offerings but programs cannot be maintained due to high cost.	*BEHAVIOR:* Users' fees are charged on a "per use" basis but are the same whether one, two or more people come in together. *RESULT:* In order to avoid high user's fee, employees will tend to bring other employees and/or families with them.	*BEHAVIOR:* Instructor only provides programs before work, at noon and after work. *RESULT:* Because two-thirds of the programs occur during family time, two-thirds of the participants must interrupt family schedule for their exercise. The families of this group do not provide unqualified support and the participants drop out.
INSTRUCTOR OCCUPATIONAL PEER GROUP	*BEHAVIOR:* Instructor will offer program if and only if a certain percentage (e.g. 10%) of the group starts and maintains attendance. *RESULT:* Co-group interest will form for the initial requirement and social bonds formed through enjoyable group activity will help to keep the group participating.	*BEHAVIOR:* Instructor sets minimum criterion for group attendance as in previous example but does not enforce it through attendance records, etc. *RESULT:* Group numbers gradually decrease until program no longer is viable.	*BEHAVIOR:* Instructor refrains from beginning daily program until all members are present. *RESULT:* Group pressure forces all members to arrive on time.
INSTRUCTOR OCCUPATIONAL PEER GROUP EMPLOYEE	*BEHAVIOR:* Instructor and exercise group review previous day's exercise and/or reduce the exercise intensity for an employee who has missed that previous day. *RESULT:* Employee learns that by missing a day he/she does not lose ground. Unintentional encouragement of absence.	*BEHAVIOR:* Instructor and/or group give friendly criticism to the employee who is late or absent from a session. They never criticize his/her performance -- just the absence. *RESULT:* Employee comes more often despite his/her level of performance so as to avoid criticism.	BEHAVIOR: Instructor and/or group criticize the performance or fitness level of an employee even if he/she is not often late or absent. *RESULT:* Because attendance does not bring about a decrease in criticism, employee quits.

Table 6

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING CONSEQUENT GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR COMPANY MANAGEMENT	*BEHAVIOR:* Instructor gives management feedback re program problems, but places emphasis on the relatively minor problems of successful segments of the program. *RESULT:* Management deals with these minor problems but ignores important problems of unsuccessful segments of the program.	*BEHAVIOR:* In regular cost benefit reports, instructor highlights the decline in health-related risk factors of participants as opposed to those of non-participants. *RESULT:* In order to reduce risk factors of non-participants management promotes fitness program.	*BEHAVIOR:* Instructor provides regular information reports but only gives quantitative feedback in terms of costs. No quantitative feedback on benefits. *RESULT:* Management is only really convinced of cost therefore removes support from the program.
INSTRUCTOR COMPANY MANAGEMENT EMPLOYEE	*BEHAVIOR:* Instructor convinces management and employees to keep productivity records on participants and non-participants. *RESULT:* Participants become aware of benefits to their job performance and continue to participate. Management rewards participants.	*BEHAVIOR:* Previous rewards for participation, attendance, improvement, etc. are terminated. *RESULT:* Occasional absences, poor effort, etc. increase to the point that employee stops improving in fitness and quits.	*BEHAVIOR:* Employee is prevented from participating in program the day after being absent. *RESULT:* Number of absences decreases, program participation increases and productivity increases.
INSTRUCTOR EMPLOYEE'S FAMILY	*BEHAVIOR:* Instructor encourages spouse of participant to indicate disadvantages (but not advantages) of program participation. *RESULT:* Spouse consciously realizes the disadvantages and stops participating.	*BEHAVIOR:* Instructor uses newsletter to indicate decreasing number of families who are not participating in the program. *RESULT:* Non-participating families feel guilty for not attending, hence they attend.	*BEHAVIOR:* Spouses who attend with children are made to feel unwelcome due to added strain on personnel and facilities. *RESULT:* Spouses stop bringing children and then due to babysitting difficulties, stop coming out personally.

Table 6 (Cont'd.)

PRACTICAL EXAMPLES OF THE USE OF EXTRINSIC MOTIVATION IN INCREASING CONSEQUENT GOAL BEHAVIORS IN EMPLOYEE FITNESS PROGRAMS

MOTIVATIONAL CHANNEL	*POSITIVE REINFORCEMENT*	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
INSTRUCTOR EMPLOYEE'S FAMILY EMPLOYEE	*BEHAVIOR:* Instructor provides information to employee's family showing relationship between training intensity and short duration fatigue. *RESULT:* Family comes to appreciate that some after-work fatigue is a necessary, but temporary part of an exercise program.	*BEHAVIOR:* Employee works out hard but does not keep a record of intensity. He/she goes home fatigued and because family does not understand exercise-fatigue relationship, causes problems. *RESULT:* To eliminate fatigue employee decreases intensity, perhaps quits.	*BEHAVIOR:* Family is required to keep a record of fatigue and other program-related problems. Record must be submitted at regular intervals. *RESULT:* Family disapproval can be linked to possible overtraining. Therefore employee reduces training intensity.
INSTRUCTOR OCCUPATIONAL PEER GROUP	*BEHAVIOR:* Instructor requests feedback re optimal time, problems, etc. but does not require the group to reach consensus and submit one report. *RESULT:* Individuals give feedback but because of conflicting requests for changes, nothing can be done.	*BEHAVIOR:* Instructor will not entertain program change requests unless they come from a formal group representative. *RESULT:* In order to have program improved and problems resolved, group itself must implement an efficient communication system.	*BEHAVIOR:* Instructor ignores informal group requests for program change. He/she perhaps does not recognize the emergence of an informal group leader. *RESULT:* Leader refrains from representing group and there is no mechanism for the group to voice their wishes.
INSTRUCTOR OCCUPATIONAL PEER GROUP EMPLOYEE	*BEHAVIOR:* Instructor implements a group points recording system that is based on individuals' improvement scores. *RESULT:* It is to the group's advantage to have the members in the poorest shape improve. They can gain the most points. Therefore the group gives more recognition to the poorest members.	*BEHAVIOR:* Group points system is based on absolute fitness level of members. *RESULT:* Group encourages the most fit employees and ignores the least fit employees. Basically there is no camaraderie built up using this system.	*BEHAVIOR:* Group point system is set up on a percentage improvement system which penalizes employees who are more fit. *RESULT:* While it is discriminatory to fit members, this system gives more status to unfit members who improve.

Direct Instructor-Participant Motivational Techniques

In the preceding section we looked at motivational techniques that were operant on planned systems. Let us turn our attention now to a consideration of the three extrinsic motivational techniques as they are applied in unplanned, everyday situations.

All fitness instructors are familiar with interpersonal situations that require them to "motivate" an individual in their charge. Table 7 provides a useful repertoire of techniques based on the general principles underlying extrinsic motivation.

Since our main goal is to keep people coming out to the fitness program despite all the distractions of business and personal life, we must be able to use extrinsic motivational techniques skillfully and frequently.

In the "Positive Reinforcement" column of Table 7 it will be observed that the fitness instructor must reward the *process* of lifestyle improvement as much, or even more than, the product itself. For example, an individual can easily see that over a three-month period they have lost ten pounds, and now look and feel better. However, the same participant will be less perceptive of improvement after only two or three weeks of vigorous effort. Granted some weight reduction might have occurred, but did it really warrant so much sweat and tears?

Just when the participant is feeling most dubious about the whole venture is the right moment for the instructor to employ positive and negative reinforcement in order to encourage the use of fitness-producing behaviors.

A word of caution is in order here. Planned use of negative reinforcement involves the removal of a punishing agent in order to encourage positive behavior. For example, the fitness instructor could post a "Bad Guys" list to identify consistently late participants, or those who are frequently absent. In order to avoid having their unsatisfactory behavior revealed to all, most offenders will probably make the effort to come regularly, and on time. However, if offenders fail to realize that removal of the punishment is under their own control (*i.e.*, that if they turn up on time their name is removed from the list) they may decide to avoid embarrassment by simply dropping out of the program. The moral here is simple: When using negative reinforcement, be sure to show participants the way out of their dilemma. There is yet another very important reason to be careful when using negative reinforcement or punishment.

Recent psychological evidence indicates that some people are more sensitive to punishment than others. The same is true for reward. What are the implications of this knowledge for a fitness instructor?

Table 7

EXTRINSIC MOTIVATION TECHNIQUES FOR USE IN THE INSTRUCTOR-PARTICIPANT RELATIONSHIP

POSITIVE REINFORCEMENT	*NEGATIVE REINFORCEMENT*	*PUNISHMENT*
. Reward the behavior as opposed to the attitude, *i.e.*, reward people when they show up at the program — not when they talk about fitness yet do not come.	. Determine what things/actions are punishing to people.	. Determine the behaviors to be *eliminated* (e.g., tardiness, absence, lack of activity, negative opinions).
. Reward frequently but not always.	. Determine the behavior to be *increased* and either withhold a reward or give a punisher until the behavior is increased.	. Make the punishment severe enough to be felt, but observe the anxiety level effect.
. Determine what things/actions are rewarding to people. Ask them.	. Note that people differ in their anxiety levels. They differ across individuals and within themselves from day to day. When a person is anxious avoid using negative reinforcement.	. Make sure the participant clearly understands how to avoid further punishment.
. Don't make the reward too large.	. Make sure that the person understands that his/her own behavior controls negative reinforcement.	. Give punishment impartially and without emotion. This helps the participant to realize that it is his/her behavior which is being punished -- not him/her self.
. Reward as soon as possible after the behaviour.	. Structure workouts so as to minimize exercise pain. What is an easy exercise for you, is maximal for the new participant. Do not make exercise so light that people fail to experience vigorous physical activity.	. If you use punishment to stop an undesirable behavior, use it every time the behavior occurs.
. Use the appropriate reward for a behavior, *i.e.* the more effort required, the more prestigious the reward.		
. Reward in this order: (1) attendance (2) effort, (3) achievement.		
. Reward personal improvement, as compared with past performance.		
. Proceed from physical/material rewards to psychological rewards to symbolic rewards.		
. Encourage participants to reward each other.		
. Reward attendance by means of log books and progress reports.		
. Scale down intensity of activities so that the participant can succeed.		
. Gradually increase the amount of effort required for the same reward.		

If people differ in their sensitivity to punishment, the instructor could well find that where verbal criticism of one participant may give him/her the boost needed to "hang in there", for another participant, the same criticism might be so traumatic that he/she feels there is no alternative but to permanently avoid the situation in the future, and you can add another drop-out to your statistics.

For the record, it appears that females are more sensitive to punishment than males, as are anxious persons as opposed to non-anxious persons.

The implications, then, are that the use of punishing agents either to encourage desirable behavior (via negative reinforcement), or discourage undesirable behavior (via punishment) should be kept to a minimum for some people.

Intrinsic Motivational Techniques

Intrinsic motivational techniques are techniques that the individual uses upon himself/herself to aid in adherence to a fitness program. Strictly speaking, this is not a pure use of the term, because most of these techniques will involve principles outlined in the extrinsic motivation section.

Physical activity by itself provides instrinsic motivation simply because the body is designed for movement. When we move, for example, and particularly when we move efficiently, we receive pleasant information that informs us that our body is in a state of synchronization. This aspect of intrinsic motivation will be covered shortly. Let us focus our attention first on the conscious *self-application* of extrinsic motivational techniques to aid in ongoing motivation.

Contingency Management

Contingency management is a motivating technique that can be used by the instructor, the participant or both. Again, the technique involves antecedent goals, action goals and consequent goals. Contingency management, in its simplest terms, is illustrated in Figure 5.

In all likelihood, the instructor will have to provide that initial counsel on which goals will be based. The instructor will also have to help the participants enlarge their goals, and establish which rewarding agents are to be used in the contract, and so on.

It is suggested that the instructor use the ideas provided in Figure 5 to establish the system, and then gradually shift the responsibility of maintaining the system over to the participant.

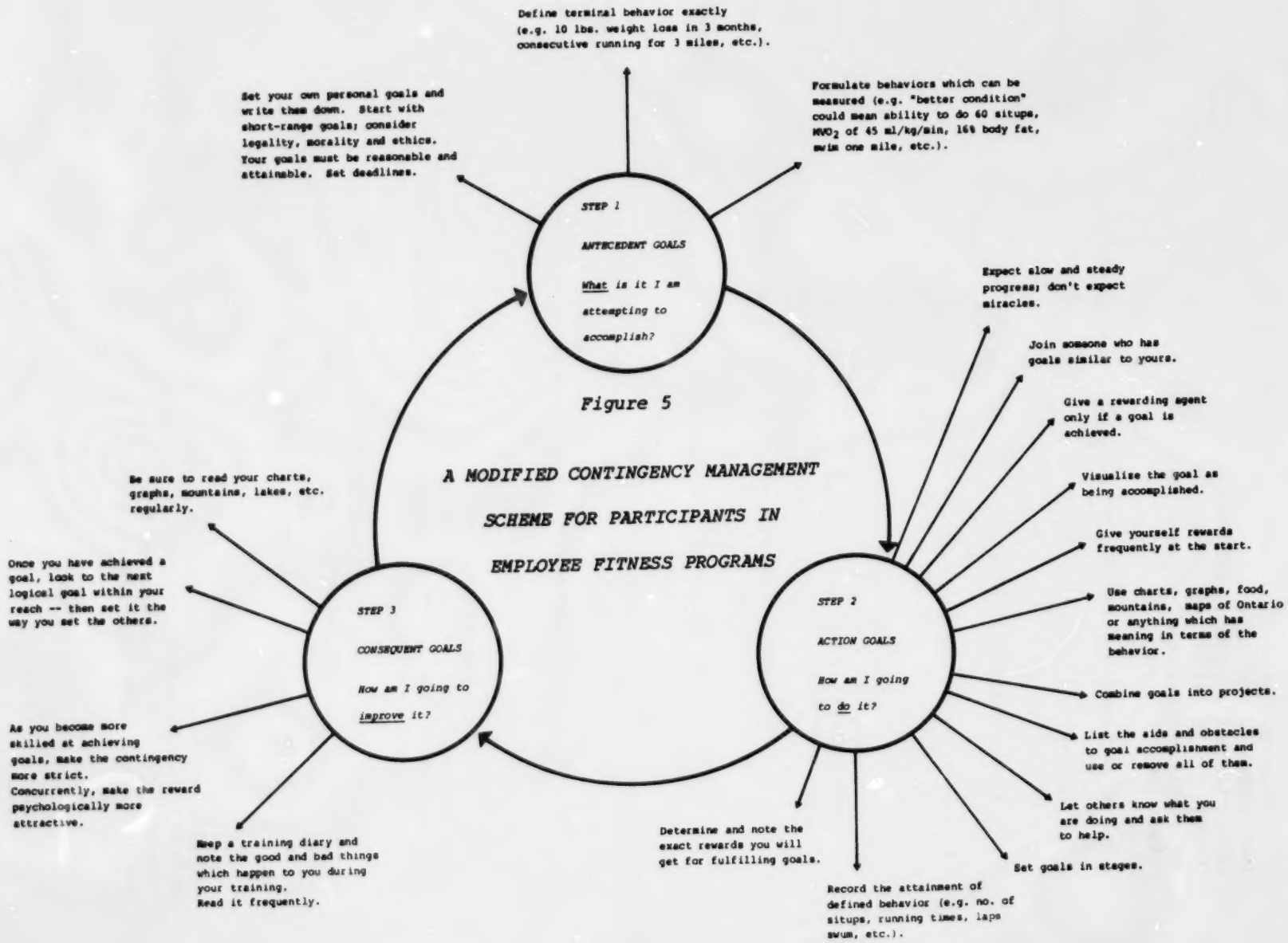

Define terminal behavior exactly (e.g. 10 lbs. weight loss in 3 months, consecutive running for 3 miles, etc.).
Set your own personal goals and write them down. Start with short-range goals; consider legality, morality and ethics. Your goals must be reasonable and attainable. Set deadlines.
Formulate behaviors which can be measured (e.g. "better condition" could mean ability to do 60 situps, MVO_2 of 45 ml/kg/min, 16% body fat, swim one mile, etc.).
STEP 1
ANTECEDENT GOALS
What is it I am attempting to accomplish?
Expect slow and steady progress; don't expect miracles.
Join someone who has goals similar to yours.
Give a rewarding agent only if a goal is achieved.
Visualize the goal as being accomplished.
Give yourself rewards frequently at the start.
Use charts, graphs, food, mountains, maps of Ontario or anything which has meaning in terms of the behavior.
Combine goals into projects.
List the aids and obstacles to goal accomplishment and use or remove all of them.
Let others know what you are doing and ask them to help.
Set goals in stages.
STEP 2
ACTION GOALS
How am I going to do it?
Record the attainment of defined behavior (e.g. no. of situps, running times, laps swum, etc.).
Determine and note the exact rewards you will get for fulfilling goals.
STEP 3
CONSEQUENT GOALS
How am I going to improve it?
Keep a training diary and note the good and bad things which happen to you during your training. Read it frequently.
As you become more skilled at achieving goals, make the contingency more strict. Concurrently, make the reward psychologically more attractive.
Once you have achieved a goal, look to the next logical goal within your reach -- then set it the way you set the others.
Be sure to read your charts, graphs, mountains, lakes, etc. regularly.

Figure 5

A MODIFIED CONTINGENCY MANAGEMENT SCHEME FOR PARTICIPANTS IN EMPLOYEE FITNESS PROGRAMS

The process is cyclical and requires constant monitoring by both instructor and participant. Setting time lines for "regoaling", in which the instructor's input is followed by participant responsibility, and rounded out by the instructor's reinvolvement, is a useful device. In any event, the following seven steps are the key to successful self-motivation.

1. Objectively and exactly pinpoint the desired behavioral goal.

2. Objectively define the appropriate rewarding agent and the behavior needed to reach the goal.

3. Record the behavior as often as possible.

4. Provide the rewarding agents almost all the time that the behavior is exhibited. Do not provide the rewarding agents when it is not exhibited.

5. Systematically change the environment to provide optimal conditions for producing the behavior. Search for environments that increase the behavior and avoid environments that decrease it.

6. Regularly evaluate the extent and frequency of successful behavioral goal achievement.

7. Once the behavioral goal is achieved to your satisfaction, set another goal.

Stimulation

We have looked at intrinsic motivation as the product of various forms of extrinsic motivational techniques. But just what is this product? Can we effectively use the techniques we have disucssed if we don't really know how these techniques affect people?

To a large extent, all these techniques work because they are related to general learning principles applicable to all higher organisms. In addition, we believe that they work because they affect a mechanism in people that responds to sensory stimulation.

We have chosen to call this mechanism the Perceived Stimulation Mechanism. We further propose that there are three general levels of stimulation -- boredom, fun, and pressure. (It should be noted that perceived stimulation can vary or "slide" between extreme boredom and extreme pressure.)

Table 8 shows how a participant's physical activity level may be affected by changes in the perceived stimulation level. Basically, the medium stimulation level, which provides what we might call "fun", is somewhere between an uncomfortably low level associated with "boredom" and an uncomfortably high level associated with "pressure".

Table 8

A MODEL FOR THE USE OF PERCEIVED STIMULATION IN REGULATING EMPLOYEE'S PHYSICAL ACTIVITY

LOW LEVEL OF PHYSICAL ACTIVITY	*HIGH LEVEL OF PHYSICAL ACTIVITY*	*LOW LEVEL OF PHYSICAL ACTIVITY*
Boredom	Fun	Pressure
SITUATION: Declining activity level due to decreasing level of perceived stimulation. Participant is understimulated. *SOLUTION:* Increase the level of stimulation	*SITUATION:* Optimal level of physical activity because level of perceived stimulation is high enough to arouse interest but not too high as to cause stress. *SOLUTION:* Maintain present situation.	*SITUATION:* Declining activity level due to increasing level of perceived stimulation. The participant is over-stimulated. *SOLUTION:* Decrease the level of stimulation.
EXAMPLES:	EXAMPLES:	EXAMPLES:
. Classical background music has no meaning to many young people in the program.	. Introduce music which can be synchronized with exercise movements.	. Senior employees may find disco music unpleasant in the gym.
. Recently retired athletes know they can meet fitness goals and they lose interest.	. Show that a fitness program is different, that the challenges are appropriate for each individual.	. Employees who failed physical education in school find the program too stressing.
. Many people may be restless when exercising indoors.	. Try offering program options -- stationary bike-riding to music or outdoor jogging.	. Some people may find jogging unpleasant.
. Published results may have no effect if they only show that a very fit individual performed as usual.	. Published results may stimulate some employees to work harder.	. Published results may embarass those who prefer privacy.
. New equipment may have no effect on those who are already familiar with it.	. New equipment may arouse many employees to try new exercises.	. New equipment may disrupt the routine of some employees.
. Relaxation programs may be difficult for those who feel they are deprived of stimulation.	. Relaxation may be effective if individuals learn to pay attention to their responses rather than external factors.	. Relaxation may be unpleasant for those who have learned that it is foolish, etc.
. Fitness test results may be uninteresting to those who have had testing recently.	. Fitness test results may stimulate many employees to learn more about exercise effects.	. Fitness test results may be frightening to those who do not understand them.
. Exercising with employees who are much less skilled may cause some individuals to drop out.	. Superior individuals may be encouraged to teach others, or groups may be balanced according to skill level.	. Exercising with others who are much better may cause some individuals to drop out.
. Posters criticizing obesity or smoking may be ignored by some individuals.	. Posters criticizing obesity or smoking may stimulate some individuals to change their habits.	. Posters criticizing obesity or smoking may be unpleasant and upsetting to some employees.

Our model suggests that in order to keep a participant's physical activity level at an optimum (high activity), we should help him/her to avoid situations that will be perceived to be either boring or pressuring. At either extreme, his/her physical activity level will drop off.

Considered in another light, we could say that low physical activity levels can indicate either too little perceived stimulation (boredom), or too much perceived stimulation (pressure). We can respond to the former by somehow increasing the level of stimulation. The latter situation calls for a decrease in stimulation.

Perceiving this distinction is often difficult, especially for adults, who have learned to modify their reactions. A participant could easily act as if he/she were bored or unconcerned with fitness test results, when actually the individual feels quite pressured by this problem, which is seen to be more than he or she can cope with.

People also differ in how much stimulation they require to provide them with a "fun" experience. Moreover, this particular form of stimulation can be derived from many sources, either mental or physical.

The instructor's task is to use his/her experience and personal knowledge of the participant to regulate the stimulation level so as to elicit the optimal physical activity level.

The crux of intrinsic motivation models is not so much how the instructor can modify the participant's inner motivation, but the degree to which the individual participant can modify this inner motivation. This is, after all, the ultimate goal of all lifestyle modification programs.

Conclusion

From the foregoing discussion, it is apparent that the problem of ongoing motivation in fitness programming is a complex one. However, we are fortunate that there is an abundant and ever-growing stock of psychological knowledge on the subject upon which to rely.

Certainly, ongoing motivation is a vital topic for all fitness professionals who strive to promote physical activity in the interests of making employees' lives more complete and satisfying.

Program evaluation

FITNESS PROGRAM EVALUATION

Jim Joy

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What Is Program Evaluation?

A well-conceived employee fitness program will have pre-established goals for both the participants and the program itself. Program evaluation is a process of determining how effectively a fitness program has achieved these stated goals and objectives. Evaluation not only of the individual program components but also of the program as a whole should be an ongoing process throughout the life of the fitness program.

Why is Program Evaluation Needed?

Program evaluation is essential if we are to determine the real results of a fitness program.

Ideally, evaluation is a helpful, positive process. It identifies program strengths and weaknesses, enabling the program personnel to make adjustments in the operation before minor problems become major crises.

In addition to telling us whether the program is responding to the needs and desires of the participating employees, evaluation results can also convey a message to the employer. Evaluation results represent a concrete demonstration of the program's value and importance.

To synthesize, we can say that evaluating employee fitness programs is an attempt to supply helpful information regarding the program to individual participants, the fitness committee and/or fitness expert, and the employer. (It should be noted that some companies will also require the dissemination of results to a variety of worksite areas, for example, medical services, personnel, union representatives, staff associations.)

Before discussing the mechanics of program evaluation, it is worthwhile to consider in some depth the ways in which the three groups identified above -- individual participants, the fitness committee and/or fitness advisor and the employer -- are served by program evaluation results.

The Individual Participant

The individual participant in an employee fitness program can be helped by program evaluation in many ways. Depending on how the program evaluation is carried out, the participant can be motivated by the knowledge that his/her fitness level has increased as a result of the program.

In turn, the participant can provide feedback concerning program content. This knowledge will help program planners design activities more suitable (and enjoyable) for that individual.

The Fitness Committee and/or Fitness Advisor

The program planners in employee fitness programs are either professionals or committees who receive counselling and direction from a fitness advisor. Program evaluation is invaluable to these individuals in their efforts to guarantee the ongoing growth and success of the program.

Good program evaluation reports are also useful motivational tools. Reports can be the means of keeping program participants keen and excited about their involvement in the employee fitness program.

A fitness program that is not subject to regular evaluation can continue for many years to offer programs that are neither enjoyable or useful. Unfortunately, it is too often assumed that because participants say nothing about the program they are happy with it. The contrary is quite likely closer to the truth.

The Employer

The term "employer" refers to the individual or group within the community who is allocating funds and taking responsibility for offering an onsite employee fitness program. Obviously, these people need to see some concrete evidence of the benefits of the program in order to remain confident and supportive of it.

The degree to which the effects of an employee fitness program are evaluated in order to get a "bottom line" result varies greatly from company to company. Due to the many different aspects of corporate life that can be affected by employee fitness programming, establishing an appropriate blanket evaluation form suited to all these elements can be an extremely complex project.

The groundwork for ensuring program justification should be established in the early stages of the program. Some form of evaluation must be agreed upon with the corporate sponsor during this preparatory period.

Always remember, that without facts attesting to the success of the program, the employer has no evidence to support the value of the program, if, for some reason, its existence should be endangered.

How Are Fitness Programs Evaluated?

There are three key steps in program evaluation. One, decide the evaluation objectives and measurement criteria. Two, gather the necessary information. Three, interpret the results and discuss them with the individuals concerned.

Establishing Evaluation Objectives

When establishing evaluation objectives, the following points should always be considered.

- What do we expect in the way of program results?
- What measurement criteria will be used to ascertain whether our expectations have been realized?
- What will be the results of the evaluation?

As previously stated, there are several important objectives to consider in evaluating an employee fitness program. What are some of the objectives of the client groups, that is, the individual participants and the employer/corporation? And what are the objectives of the service personnel, that is, the fitness committee and the fitness director?

An individual's objectives can include losing weight, increasing body strength, improving his/her appearance and just plain enjoyment. Some individuals, heeding fitness testing results, will set fitness improvement as their goal. Still others participate because they want to achieve a certain skill level, for example, they want to participate in a marathon or a fun-run.

Employer or corporate objectives are usually more pragmatic, but no less worthwhile. Corporate objectives can include increasing the health and happiness of the workforce, improving morale, decreasing absenteeism and staff turnover, increasing productivity and safety, and decreasing health care costs. The fitness program may also be perceived by an employer as an improvement of worksite attractiveness, and therefore attribute indirectly to recruitment success.

The objectives of the fitness committee and/or the fitness director may encompass providing proof of the feasibility and benefit of employee fitness programs to management, having program participants enjoy and benefit from the program, and making sure that a good percentage of the workforce is involved in the program. Maintaining good attendance and using budget resources effectively are also objectives of these individuals.

As you can see, the objectives of the various segments at the worksite are quite diverse.

In the early set-up stage of the fitness program all these objectives should be recorded and approved by all concerned, so that a continuing evaluation process may be established.

A word of caution about setting objectives should be sounded at this point. Objectives are the "nitty gritty" of what you intend to do in your program. Therefore, it is essential that time and effort be expended on working through the specific ideas of everyone who is, or will be, involved in the program. Too often, a planning group or employee fitness committee will talk in generalities about goals and objectives and discover, too late, that everyone had a different idea about what should happen in practice. It is best to agree on a few limited, attainable objectives rather than trying to reach several vague, grandiose goals.

Gathering Information

Once a set of concrete objectives is established for the program, the next priority is gathering the information necessary for evaluating the program. If the project's objectives are clearly defined, and if co-operation from all the pertinent segments of the company is forthcoming, then an ongoing evaluation process that will facilitate data gathering can usually be established.

Information may be gathered from the program's records, from ongoing fitness tests, from questionnaires and from participant interviews. Each of these sources warrants scrutiny in some detail.

Program Records

As part of normal operational procedure certain records pertaining to attendance, dropout statistics, staff turnover, data etc. are maintained on a continuing basis.

The nature of the information to be gathered and the record-processing method will have been decided upon in advance by the program committee in light of the articulated goals and objectives of the program. The following checklist is a useful guide to some standard fitness program records.

- Attendance records. (These may be either charts or forms on which participants sign in and out to signify their attendance.)
- Activity records. (Charts or forms on which participants record achievements such as distance run, timing, number of exercises completed or games played, etc.)
- Program withdrawal records. (Forms to be used to identify when and why individuals cease attending the program.)
- Goal-oriented rewards records. (A record of attained achievement levels in specific participatory activities. These records have the added advantage of being excellent motivational tools.)

As some of the program's records cover areas of vital interest to the corporation, for example, absenteeism and staff turnover, the employer may wish to mesh both sets of records as they pertain to company employees who participate in the fitness program. It is important to note, however, that the inclusion of corporate personnel records (absenteeism, staff turnover, etc.) in fitness program evaluation is complex and requires a high degree of co-operation and facilitation on the part of management.

Ongoing Fitness Tests

Fitness testing is a very standard and valuable method of program evaluation.

An initial fitness test carried out before the program gets under way is followed up by retests at the end of various program phases. Fitness tests yield data on cardiovascular fitness, strength and flexibility, lung capacity, body fat percentage, body girth measurements, body concept, nutritional changes etc.

To achieve maximum benefit from fitness tests, it is important to keep accurate records of the results. These test records can be easily analyzed at the conclusion of a specific program phase to show program effects relative to identified objectives.

Questionnaires

Another viable means of gathering information is through a questionnaire. Questionnaires are a particularly effective device for discerning participants' feelings about the program.

Give some thought to the design and format of the questionnaire. Keep the questionnaire short and concise -- no more than two pages in length. Open-ended questions may have the potential for providing in-depth information, but are often viewed by the subject as being too difficult, and are, as a result, generally ignored. Moreover, the responses are difficult to analyze and interpret. Multiple-choice questions or questions that require one-word answers are preferable.

The apparatus you establish for distributing and retrieving the completed questionnaire is almost as important as the questionnaire itself. Ideal distribution routes include personal handouts, either to each individual or in a group session, insertion in payroll envelopes or via a mailing to the employees' home. Whatever method you adopt, your questionnaire should be accompanied by a brief note stating the purpose of the questionnaire; whether the volunteered information is confidential; how the results will be used; names of those who will view the results and just exactly what benefit the recipient can expect to gain from the exercise. It is important that the recipient of the questionnaire be made to feel that his/her opinion is valued and that it will make a difference to the program as a whole.

Keep the avenues for returning the questionnaires as simple as possible. Ideally, questionnaires should be returned to a supervisor or an easily identifiable peer within the company. Relying on informal channels of response, for example, having a group act as a clearinghouse for the questionnaires, is not a particularly good idea. Questionnaires are prone to being mislaid in such circumstances.

Finally, the response rate for mailed questionnaires ranges only from 10 percent to 30 percent -- no matter what amount of energy and effort you put into a follow-up blitz. It goes without saying that for best results you should personally distribute and collect the questionnaires.

Once the completed questionnaires are in, the data should be analyzed promptly. A report of the results should be made available to the respondents as quickly as possible. Immediate feedback is the surest way of guaranteeing a good response next time.

Where management has established systems to measure corporate changes such as absenteeism and employee turnover, data you have gleaned on these issues may not be relevant to program participants. The employer will likely use this information to justify continuing or increasing financial support to the fitness program.

Interviews

Interviewing is a simple, direct method of conducting program evaluations, and works particularly well with participants who are not very comfortable with written communication.

Interviewing procedure is quite straightforward. Construct a short list of key questions you would like to put to the participants. The list may be compiled by the fitness committee or the fitness director in conjunction with a small group of fitness participants.

Choose your interviewers with care from the employee group. As you want to elicit honest, unbiased responses the fitness leader should not be involved in the actual interviewing process. Very few people will be bold enough to come out and tell the leader just what they think about the program!

Group interview sessions in which all the program's participants meet to discuss a series of questions that have been circulated in advance are an excellent means of ensuring that everyone has his/her say about the program, especially if the groups are kept small.

For all interview sessions, but especially for group situations, you must establish an effective note-taking procedure.

If you want to conduct individual interviews, you should ensure that the interviewers standardize the questioning format. Unstructured interviewing is a lot of fun, but rarely yields much information.

Where it is not feasible to talk with all participants via the individual interview method, you should limit your interviews to a select representative group.

As with questionnaires, you must explain to the interviewees how the information will be used, and why their opinions are important. Always be honest about the uses of this volunteered information. If you cannot explain the purpose of the interview clearly, you still have more homework to do before you begin your evaluation process.

Interpreting and Using Results

Once you have gathered the information and are satisfied that you have a reasonably complete and accurate picture of the results of your program for that time-period, you should ask yourself the following questions:

- How will we use the results?
- In light of the results, what are we doing now that we could do better?
- What changes can we make to improve the program?

If your evaluation has been done correctly, the ensuing report of your findings should be of interest to your three core groups -- the individual participants, the fitness committee and/or fitness advisor and the employer. Moreover, your interpretation should show you new ways to increase program involvement, optimize program changes and ensure continuing management-level support.

Should evaluation reports show that the fitness program is not meeting its goals and objectives, don't skirt this unpleasant fact, but deal with it honestly. Be open to suggestions as to why program objectives have not been met.

If the evaluation results indicate that a different style of programming is in order, or that some components of existing programs should be changed, act upon these findings as quickly as possible.

To conclude, it must be stressed that successful fitness program evolution depends on the judicious use of program evaluation and the prompt implementation of evaluation results.

Finances

FINANCES IN EMPLOYEE FITNESS PROGRAMMING

Robert S. Wanzel, Ph.D.

Professor Wanzel is the Director of Sports Administration at Laurentian University. An undergraduate program, Sports Administration combines business administration with the field of physical activity. Professor Wanzel has studied employee fitness programs across North America, and has been actively involved in both industrial recreation and employee fitness in numerous Canadian centres.

"Positive approaches to the development of working capacity can be quite expensive, but when viewed against the likely dollar cost of cardiovascular disease, such expenditures would seem amply justified."

R. Shephard

The above statement neatly summarizes the major premise that underlies corporate thinking in regard to the development of an employee fitness program. Moreover, it is also indicative of the fact that companies are now displaying a greater responsiveness to the needs of their employees.

But no matter how worthwhile an employee fitness program is perceived to be, the decision to go ahead will generally be made after considering a benefit-cost analysis for such a program.

Obviously, the amount of capital on hand will play a major rolé in determining the type of fitness facility a company should opt for, as well as the method used for securing the chosen facility.

When selecting a fitness facility, a company has eight basic options from which to choose.

1. A natural area close to the company building.
2. Using the natural area for activity, and providing changing rooms and showers.
3. Renting an outside facility.
4. Paying for memberships in outside facilities.
5. Developing an individual activity area.
6. Developing a group exercise facility.
7. Sharing a full fitness centre.
8. Providing a full fitness centre.

In Canada, the most popular type of facility program has proven to be a converted on-site facility (35%). Next comes participation in outside programs (27%), followed by the rental of facilities (20%), and finally, on-site facilities built into the design of a new building (18%).

If a company proposes including a fitness facility, what kind of cost breakdown is the company looking at? If we consider costs over a period of 40 years, 2% can be attributed to capital costs, 6% for operating costs, and 92% for salaries. In light of these figures, it is not inconceivable to include a fitness facility in original design proposals. In fact, if 1% of a building's capital cost is set aside for aesthetics (plants, murals, etc.), why shouldn't a sum -- say 3% -- be set aside for the provision of some type of activity area? Such an arrangement would then take into consideration *both* the psychological and physical requirements of the employee in the work environment.

In addition to initial costs, any benefit-cost analysis must also consider the ongoing or operating costs of a program and/or facility, as well as apportion responsibility for the total costs to either the employer or the employee, or to a combination of both. If the latter option is adopted, ease of handling of employee contributions must be considered; as, too, must the cost factor involved in handling these contributions.

Employee contributions to a fitness program can come in a multitude of ways, as this discussion will demonstrate.

Eight Program Facilities and Their Initial Costs

Before a fitness program and/or facility is considered by a company, a number of financial and psychological questions should be examined and answered.

1. What is the present financial condition of the company? How will it shape up in the future?

2. What type of programming is already available in the community?

3. Would the company's corporate image within the community suffer if it set up its own program at the expense of programs and facilities run by local private organizations? Could this provoke a financial backlash against the company, and result in poor product sales in the area?

4. What lifestyle routines and traits are peculiar to the company's employees? Do they have to commute to work? Do they live close to work? Do they have many outside activity interests, etc.?

5. What is the philosophy of the Management? Is Management concerned about the company's employees? Is Management paternalistic? Does Management provide a number of other benefits, such as company picnics, etc.? Would an employee fitness program be in keeping with Management's perception of the company's corporate image?

6. What are the local costs of supplies for a fitness program? equipment costs? labour costs?

7. What is the climate in the area?

Answers to these questions may have a direct bearing on the type of program and/or facilities the company would select.

The Xerox Corporation has developed a criteria sheet for starting new formal Xerox recreation association activities. The Xerox criteria sheet assesses interest, finances, facilities required, legal considerations, leadership, and the recommendations of the professional staff. A similar criteria sheet should be developed when considering any employee fitness program.

Now let us consider some of the initial costs of running each of the eight available types of programs and/or facilities.

1. Natural Area

If a company simply uses a field or area that is close to the building, there are no initial costs involved.

Should the company be interested in building a parcours or exercise stations throughout the natural area, costs would be reduced if a local service organization could be persuaded to get behind the project. In return for this support, the facility would be open to the public.

A facility intended for company employees only, will result in certain inescapable labour and material costs, but these can be minimized if construction is undertaken by the employees themselves.

The company might also be interested in utilizing a natural area through the building of a skating rink. Here, too, the initial costs are relatively small.

Some companies use areas around their particular buildings for employee walking tours. This type of program can provide healthful and entertaining lunch hours, especially if the company is located in a downtown core close to museums, parks, etc.

2. Rented Facility

In the case of a rented facility, the initial costs would depend on the type of facility involved. For example, the use of a school gymnasium might cost considerably less than the rental of a Y.M.C.A. or a private spa. Rental of school facilities would probably be in the range of $10 to $20 per hour. A hockey arena would probably charge anywhere from $20 to $50 an hour for ice time. Rental of Y.M.C.A. facilities or a spa would probably be in the same range, if not higher.

If a company is located in a suburban area or country resort setting, it might be feasible to rent a camp that is used only at certain times of the year by boy scouts, the Y.M.C.A., etc. As the company would be using the facility during a normally unoccupied time, the rental should be quite reasonable.

Another alternative is to approach the developer or manager of a nearby apartment complex or hotel that has an exercise area. During many periods of the day, these facilities are not used by the tenants or guests, and could well be available at a very cheap rate, probably from $10 to $20 an hour.

3. Membership in a Facility or Club

The size of the facility or club, and its location will determine membership costs. A large, prestigious facility in a prime downtown location will probably charge a minimum of $300 a year for a membership. In addition to the membership fee, there could well be an initiation fee, probably $1,000, and perhaps a minimum monthly bar and food cost.

A company can reduce initial membership costs by stipulating that it will not pay any employee's membership costs for a specified time period, say one year. If, after this time, the employee shows an attendance record that is acceptable to the company, the employee's fees for the subsequent years of membership would be paid by the company in full, or in part. In this way, the company can avoid getting locked into contracts on behalf of employees who fail to participate. Thus, the company does not have to get concerned about being locked into contracts on behalf of employees who cease to participate in the program.

4. Showers and Changing Room Conversions

Showers and changing room conversions are especially desirable if a company has incorporated a fitness program into a natural area surrounding the building, or if the worksite is accessible to employees by running, skiing, biking, etc. Such conversions are popular with small firms that cannot afford a spacious workout area.

Inexpensive lockers and showers in a basement or storeroom are satisfactory for a good exercise program. Approximately 7 showers (1 shower to 100 people) would be required. Lockers should be just for changing, not storage, and employees can double up if the demand for lockers is great at a particular time. Adequate conversion could probably be accomplished for approximately $5,000, although conversion costs will vary depending on access to water pipes, etc. Once again, employee labour could be used to convert the facility.

Another method of providing shower and changing facilities, only without using existing building space, is to purchase or rent a trailer, which can be converted into a shower and changing facility. The trailer can simply be parked outside the building. Should attendance or participation in the program falter, the trailer could be sold or returned to the rental firm.

5. Individualized Activity Area

An individual activity area requires a minimum of 400 square feet. As a rough guideline, approximately 2½ square feet per participant is necessary. Space in an existing building can be converted into an individualized activity area. Ideally, new buildings should include specifications for such an area.

The initial cost of such an area will necessitate an analysis of the type of program to be offered. For example, if only flexibility and yoga-type classes will be conducted in the individual activity area, the equipment outlay will be small.

In actual fact, however, most of these capsule-lab type facilities work on a circuit training program using equipment such as multi-station exercise machines, bicycles, treadmills, and various smaller apparatus. The minimum equipment costs are in the vicinity of $3,000.

An individual activity area also needs easy access to a locker and shower area. Consideration must be given to one changing area for men and one for women, or a combination area that can be used at different times.

Generally, an office area is also an integral part of an individual activity room, the result of the individual nature of the program. With individual activity programming, a card system, on which each participant can record his or her progress, is usually maintained.

A rough cost estimate for this type of facility is $40 to $60 per square foot. Naturally, these costs can be lowered if employee labour is used to either convert an existing facility, or to build a new facility.

Additional facility costs include carpet installation, a music system, aesthetic decorations, sauna or steam room, etc.

6. Group Exercise Facility

A minimum of 2,500 square feet is necessary for a group exercise facility. This minimum square footage figure will probably depend on the program's participation forecast. For example, if only 20 people were working out at any one time, minimum square footage would be approximately 1,600 square feet.

As a rough guideline, to renovate an existing storage area of 5,000 square feet costs approximately $60,000. This area would include a jogging track. A 2,500 square foot facility would probably necessitate a minimum of 8 showers and 60 lockers. Hiring a leader for the program could also be considered, although costs would be reduced if volunteer leaders are utilized.

Equipment-wise, such a group room could have a number of exercise stations, plus a large floor area for group programming. In terms of

costs, the outlay for equipment will surpass that of the individual activity room. Naturally, costs for sound systems, sauna or steam room areas, etc., will be greater, because of the larger size of such equipment, and the increased quantity of the facilities.

7. Complete Fitness Centre

A company with a very large number of employees at one location might well consider having a complete fitness centre. One company has purchased an old Y.M.C.A. building for this purpose. Others have considered purchasing spas that were going out of business.

In general, however, the establishment of a complete fitness centre is feasible only when it can be incorporated into the design stages of a new building. As a rule, there is usually not enough storage, waste, or unused space in an existing building that can be given over to a complete fitness centre. After all, a complete fitness centre might include squash courts, racquet ball courts, a swimming pool, a therapy room, an office for the staff, and a large locker and shower area. Saunas or steam rooms could also be considered. Such a facility will probably require a financial outlay for one full-time and one part-time fitness leader.

If a company is considering building a facility of this kind, thought must first be given to the purchase of land. Land taxes must be taken into consideration. The type of land under contemplation might also have an effect on capital costs. An area that would necessitate a lot of preliminary blasting, for example, would be more expensive than an area where construction could proceed unimpeded.

8. Fitness Centre Sharing

Under a fitness centre sharing arrangement, companies can enjoy the benefits of a complete fitness centre, without having to establish and maintain their own facilities. Six or seven companies located in one large building may become members in a fitness centre that is run either by the developer, or by a private company.

If a developer leases space out to a private fitness concern, then each participating company would simply pay membership dues to the private company for each of its employees who take part in the fitness program.

On the other hand, if all the participating companies decide to operate facilities for the benefit of *all* their employees, then each company should expect not only to be charged a certain portion of the total program costs, but also to underwrite a certain percentage of lost rental revenue because the square footage would not be leased out. Initially, costs would probably be comparable to memberships in an outside private facility or club (a minimum of $300 per person).

A promising recent innovation is the development of industrial parks built around recreation facilities, like the 7½ acre park in Anaheim, California. This park boasts a jogging track, and tennis, volleyball, and basketball courts. It also includes an attractively landscaped nine-hole putting green, a picnic area, and centrally located shower and locker rooms that include saunas. Industrial parks may be the ideal solution for meeting the fitness needs of smaller companies, and for companies that need to be located in areas where land prices preclude extensive outdoor recreation facilities.

Another beneficial option is the sharing of facilities by industry and public parks. Close co-operation between private industry and local government can enrich the recreational programs of both by increasing the number and variety of facilities each has available. There is no perfect formula for developing such sharing programs. For the most part, success will depend upon the initiative of the leadership involved, and upon the maintenance of a sound, friendly relationship between private and public recreation professionals.

Any facility cost discussion, from a simple conversion to showers and changing rooms all the way to a complete fitness centre, should make use of an analysis of the peak flow requirements for both employees and the facility. How many participants will go through the facility in one peak hour? How much equipment will be necessary to effectively handle this number of participants? A time study should be done to ascertain the length of time a participant spends from the moment of arrival at the facility until the workout is concluded, and the participant leaves the facility.

Table 1 provides a rough guideline to costs as they relate to programs and facilities.

Table 1

PROGRAM AND FACILITY ALTERNATIVES CHART

PARTICIPANTS	*FACILITY*	*SUPERVISION*	*COST* *
5 - 50	non or minimal	test & exercise prescription with follow-up	$100 - $350
75 - 250	1,500 - 3,500 square feet	part-time and/or full-time	$250 - $350
400 - 850	6,000 - 1,200 square feet	full-time (8 - 12 hours per day)	$200 - $350

* Approximate cost per participant per year

NOTE: The approximate annual cost per participant is based on the operating expenses (including capital costs) plus facility and equipment depreciation over ten years. The lower cost figure is correlated with the maximums shown in the "Participants" column.

In analyzing the financial implications of an employee fitness program, the following formula should be kept in mind.

The annual value of the program to the company should be three times greater than the annual operating budget, plus the annual depreciation of the capital investment.

A 1% improvement in productivity could easily justify the cost of the program. The key to success is to come up with some concrete productivity measures.

Ongoing Costs

Let us turn now from the initial costs associated with an employee fitness program and/or facility to the likely ongoing costs. Naturally, the following costs will not apply in all cases, and it should be understood that some companies may have specific, unique, ongoing costs that will not be covered in this discussion.

1. Leadership

Full-time leadership would probably cost the company a minimum of $10,000, plus benefits, annually. In addition, there should also be some money set aside for travel and professional development, via courses, conferences, etc.

Even if the company plans to use employees as fitness leaders, an ongoing, in-built cost factor for the training of these leaders can not be avoided. Volunteer leaders will usually require a minimum of 30 hours of instruction. An outside agency would probably put two people on a leadership training program at a cost of $25 an hour (approximately) for each would-be instructor. As a result, initial training will cost the company about $1,500. Due to leader turnover, a certain amount of money will have to be allocated on an ongoing basis for the continuation of a volunteer leader program.

A company may also decide to pay an employee leader a stipend for each hour of his/her instruction time. This could range anywhere from $5 to $15 per hour. Some companies prefer to give the employee leader time off from work to lead the activity class. In the latter situation, the employee would not normally be paid beyond his salary for his leadership role.

Leadership can also be purchased from an outside agency or from an individual professional for $10 to $40 per hour.

2. Rentals

The projection of rental costs should always include a built-in yearly allowance.

While a long-term contract with a rental organization would guarantee a fixed rental fee for the length of the contract, most companies shy away from these arrangements as they fear a drop-off in program participation.

3. Billing and Bookkeeping

Billing and bookkeeping may or may not be a concern, depending upon the nature of the employer-employee contributions. In addition, if an employer is contributing to the fitness program, billing and bookkeeping costs will depend upon the method of collection used.

Even if an employer is not charging employees for program participation, bookkeeping costs will still be incurred because of the need to maintain certain records and files. The supervisory responsibility for the program will most certainly fall on one of the company departments.

4. Repairs

Repair costs will certainly relate to equipment (either inside a building or outside, e.g., on a parcours trail) and to plumbing, ventilation, decoration, etc. Consideration should also be given to the transportation costs involved in sending equipment away to be repaired, if it cannot be repaired locally.

5. Cleaning and Maintenance

The actual janitorial service required for maintaining a fitness facility may be great in terms of hours.

Obviously, cleaning costs can be reduced by having participants work out in sweat suits in a carpeted area. The cleaning required for tile floors is much greater than for carpets. Some type of maintenance cost for the equipment and shower area will also be necessary.

6. Secretarial Costs

It may come as a surprise to realize that there are also costs relating to achievement records and awards.

As already noted, the operation of a successful program translates into a great deal of paper work. Participants will want to record their fitness progress, which means that someone must take care of the filing and updating of their progress cards.

The program may sponsor a newsletter, which will mean typing and mailing on a continuing basis. Who will send out reminder notices to people who have not attended the last couple of fitness classes? Moreover, there will be secretarial work involved in dealing with your awards or incentive program, for example, the ordering of crests or T-shirts, etc., and their distribution.

Finally, as the program becomes successful, interest in it will grow accordingly. It may well be necessary to delegate someone who is conversant with the program to give tours, fill out questionnaires, and perhaps become involved in research studies. A cost factor should really be assigned to all of these things.

7. Equipment Purchases

While major equipment will be purchased during the initial set-up of the facility, a number of small equipment purchases will have to be made each year. For example, a stop watch may be a necessary item for a particular program; stop watches tend to be misplaced or broken quite easily. Other ongoing replaceable equipment pieces are grip strength indicators, medicine balls, skipping ropes, etc. Equipment repairs to larger pieces should also be considered.

8. Laundry Costs

Laundry costs need only be a factor if, for instance, the company hands out towels. Towels could be bulk cleaned by an outside company, or perhaps the company could purchase a washer and dryer for this purpose. If the company does provide towels, the wear-and-tear replacement process is also an ongoing cost.

9. Uniforms

A company may decide to provide program participants with shorts and T-shirts. Laundry and replacement costs could be a factor here, too.

10. Toiletries

Many companies provide toiletries as a benefit for their employees after their workout.

Employer-Employee Contributions

A study done by the Federal Government on employee physical fitness in Canada may serve as a useful introduction to this area. The study found that:

- 49% of the programs were initially financed by employers.
- 24% of the programs were initially financed by employees.
- 22% of the programs were initially financed by both employers and employees.

As to ongoing financing, the study found that :

- 29% of ongoing financing was provided by employers.
- 21% of ongoing financing was provided by employees.
- 44% of ongoing financing was on a cost-sharing basis.

These statistics reveal that no one particular method of financing an employee fitness program is dominant.

Many companies contribute to their employees' recreation association on the basis of some kind of formula. The formula is usually based on the number of employees at the site, the number engaged in the recreation program, or the amount contributed by the employees themselves.

At some companies, the recreation association's funds are received through the sale of activity membership cards. The company then matches these funds on a two-to-one basis.

Still other programs derive funds largely from membership dues, which are usually matched by the company. Some companies contribute in other ways, for example, the company might pay for all capital purchases, underwrite the costs of certain tournaments, the company picnic, and special events that the company believes to be especially beneficial for public relations.

1. Employee Preferences

For the most part, employees feel a greater interest in programs to which they contribute. Dr. John H. Rapparlie is a corporate psychologist who has served as a consultant in many personnel studies. His research and experience have led him to conclude that employees really do not want everything provided for them. Reporting on his finding, Dr. Rapparlie states: "Our participants have expressed preference for a program supported no more than 50% by company funding, refuting the commonly held opinion of management that employees are only interested in a 'free ride' and in 'give-away' programs."

In part, the desire of employees to provide much of their recreation funding stems from the pride of doing something for themselves. To a larger extent, it may also stem from a desire for a greater degree of independence. Employees recognize the truth of the old saying: "Who pays the piper, calls the tunes." Not unnaturally, the employer who funds the program feels entitled to control expenditures.

Another reason for the growth of employee or association contribution to the costs of fitness programs is that employees often desire a more expensive program than the company is able or willing to support alone.

In 1976, Richard M. Brown, General Manager, Texins Association, Texas Instruments, conducted a personal survey of a large number of National Industrial Recreation Association member associations. In analyzing the survey results, he found that programs with facilities averaged an annual expenditure per employee of about three times the average of programs without facilities ($32.00 compared to $10.70).

Brown also found a direct correlation between the sources of income and the amount available to the organization. The greater the number of sources, the larger the amount available per member. His findings are represented in Table 2.

Table 2

AVERAGE INCOME FROM VARIOUS SOURCES

METHOD	*NUMBER OF COMPANIES*	*AVERAGE $/EMPLOYEE/YEAR*
Company contribution only	9	$17.31
Company contribution and dues	9	$22.66
Vending only -- no dues and no company contribution	6	$10.71
Vending + Dues + Other (no company contribution)	5	$27.16
Company contribution + Vending + Dues + Other	11	$30.31

2. Dues and Fees

Some dues and/or fees probably should be charged, even if other funding sources are operative. As research has shown, if employees have some

financial stake in the program, they tend to participate more, and are more willing to assume some responsibility for the program. And what program is so wealthy that it cannot make good use of some membership dues or fees? With additional revenue, new activities can be added and more services provided, to the benefit of all participants.

It is essential that in deciding upon a dues and/or fees structure, the recreation association makes certain that the benefits to the members outweigh comparable benefits that could be obtained from commercial sources for the same cost.

Xerox Corporation employees who are enrolled in the company's physical fitness program pay $7 per quarter, which covers registration and towel fees. Xerox executives have a separate facility, and are charged $150 per year. This fee includes a personalized fitness program as well as cardiovascular tests.

At the General Dynamics Convair Recreation Association (CRA), 300 employees signed a petition asking for a physical fitness facility. Utilizing a great deal of weekend volunteer labor, the facility was built, and soon had a membership of 492. The annual membership fee of $50 may be compared to the $275 fee charged by an outside group. All costs, including the salary of a full-time physical fitness director, are offset by the membership fees.

The Northern Natural Gas Company has a $6 per month charge for participants, which is deducted from their payroll cheques. The Health Club provides men and women with all gym clothing, except shoes and towels.

3. *Self-Built Facilities*

Some outstanding recreation facilities have been built by the employees themselves. Mention of a few of these facilities will perhaps inspire other fitness associations, for they demonstrate what can be achieved with determination and commitment.

One of the best examples is Missile Park, the primary recreation centre for the General Dynamic CRA in San Diego, California. CRA's finances come almost entirely from vending machine profits. It took CRA almost 5 years to accumulate the funds needed to develop Missile Park on 27 acres owned by the Company, but assigned to CRA for recreation. While the funds accumulated, plans for the program were instituted.

Different departments within the company were given the responsibility for planning and developing specific parts of the park. Not only did this ensure wide employee participation, it also spurred a friendly rivalry which contributed to quality work and the earlier completion of the formidable undertaking. Even so, it took almost 8 years to complete one of the finest employee recreation centres anywhere. Understandably, the pride of the CRA in Missile Park is all the greater because all labour, with the exception of plastering, plumbing and electrical work, was donated by company employees.

The activity centre at Missile Park is an 18,000 square foot clubhouse, which provides an auditorium, the CRA offices, 12 meeting rooms, and workshops. Missile Park also includes 2 lighted tennis courts, a health club with saunas, a lighted softball park, a 13-acre picnic area with a children's railroad, a merry-go-round, barbecue facilities and picnic tables. It also has a model Western Town with horse-show facilities.

Another inspiring example is Long Hollow, the lakeside family camping park of the Lockheed-Georgia Recreation Club. The Lockheed Company bought 19 acres of farm land, and leased a water-access of approximately 10 acres from the U.S. Corps of Engineers, for recreational purposes. Volunteer work parties were organized to develop an access road and to clear the beach area. Since then many camping work parties have been organized.

Long Hollow Park has 52 first-class campsites with water, electricity, and picnic tables. There are 3 boat docks, 2 large picnic areas with individual grills and picnic tables, a centrally located playground, 2 restrooms with hot shower facilities, 2 dump stations, 2 open-air patio shelters, and 2 storage shelters. Almost all the roadways have been asphalted.

Development still continues. Members vacationing at Long Hollow undertake, at their own expense, projects such as building concrete steps in the camping area, purchasing and transplanting trees and shrubbery, and making directional signs.

Finally the fine recreational facilities offered by Goodyear, at Akron, Ohio, are mostly due to the employees themselves. When the Hunting and Fishing Club wanted a lodge, the Company donated the land and gave some financial help and materials. Management stated that club members, most of them craftsmen in the plants, should build the lodge themselves. They did so, and apparently enjoy the lodge a lot more than if it had simply been provided for them.

Other fine self-built facilities exist, illustrating that there is potential here that many corporate fitness programs have not yet seized upon.

Contribution Collection Methods

If an employee is expected to contribute to the operation of an employee fitness program, then the dues must be collected in a convenient and efficient manner. There are a variety of ways that this can be accomplished.

1. Payroll Deduction by the Company

Program participation should be voluntary, but for those who do wish to participate, the payroll deduction method is probably the most convenient. Under this arrangement, company resources, such as accountants and financial computing systems, are put to work for the benefit of the employees.

Naturally, this constitutes a cost factor that must be absorbed by the company.

Each employee who wishes to participate in the fitness program would simply sign a release form authorizing the payroll department to deduct a set amount from his/her paycheque, either on a monthly basis or in one lump sum. Individual budget planning tends to be easier with this method, especially if the monthly deduction system is used. On the other hand, the cost factor to the company would be lower if the total dues were taken off in one lump sum, as paperwork would be minimized.

2. Payments to the Employee Association

If an employee association is operable within a company, then the program participants' dues can be collected by the association. Either a lump sum or monthly payment system can be used for collection. However, collection by the association will require a great number of volunteer hours to effectively handle the bookkeeping. Naturally, it would be preferable to have a volunteer from the payroll department supervise the collection.

It should also be noted that the employee association can receive the dues after the company has collected them via the payroll deduction method. An authorization form would again be signed by each employee, stating that the company may deduct the dues from his/her paycheque and forward them to the employee association. The company makes the collections and then forwards the total amount to the association, accompanied by a list of employees and their contributions.

No matter who collects the dues, if collection is made via the one-lump-sum method, then a certain portion of the moeny could be invested. This can be advantageous for the fitness program; however, expecting employees to pay their dues in this fashion could prove to be too onerous.

Financing Fitness Programs

This section will focus on some revenue generating possibilities within the scope of employee associations.

1. Vending Machine Profits

Next to company contributions and employee dues and fees, vending machines can be the most important source of revenue for employee fitness programs. Indeed, sometimes they are the only source of revenue. Though vending machine profits are, indirectly, company contributions, in most instances, neither the company nor the employee association choose to consider them in this light.

Vending machine profits can be quite substantial. Yet as a major source of revenue, vending machines have one notable weakness: machine

vending revenue is keyed closely to the number of employees, so that temporary employee reductions may play havoc with employee association budgets and plans. Some costs do go down with lessened participation, but certain fixed costs associated with the ownership or operation of facilities cannot be controlled, unless the facilities are closed down or liquidated.

Further, while vending machine profits can be substantial, they are not automatically so. Unless the vending operation is well managed, the profits may be small, and employee dissatisfaction great. In these circumstances, replacement of the offending vendor stops complaints and substantially increases sales.

The importance of good administration of the vending operation is underscored by the experience of the Cummins Employees Recreation Association (C.E.R.A.) of the Cummins Engine Company, Columbus, Indiana. Deriving its income from vending machine profits, and using a great deal of volunteer labour, C.E.R.A. built an outstanding activities centre. When vending profits were found to be inadequate to melt the demands of the centre, it was decided to put the vending operations on a more business-like basis by securing competitive bids for the concessions. As a result, profits increased even more than expected.

Keep in mind that arrangements for raising revenue should always be advantageous to the individual members as well as to the association's treasury. The association is after all, its collective members. If an arrangement is disadvantageous to the members, it is disadvantageous to the association, no matter what the apparent association profits may be. No deal is a good deal if it sells the individual members short. Members soon quit patronizing poor deals, but their ill will toward the association or its management goes on and on. Morality and money both support the position that the only good deals are those that benefit members and association alike.

2. *The Assocation Store*

The association store as a revenue producer is better suited to a company with a suburban location, but could well succeed in a downtown location.

The well-planned and operated association store can be a good source of revenue; can save the members money; and can be of real service by making shopping more convenient. If service to members is a stated objective, and if the store does business only with members and their families, its profits ought not to interfere with the organization's possible tax-exempt status.

There are more association stores in operation than are generally known. In some instances, the company management does not want any publicity about the store lest the competition be offensive to business interests important to the company. Going concerns can generate revenue from a few thousand dollars to millions of dollars.

Store offerings can include hard goods, soft goods, jewelry, health aids, small and major appliances, sporting equipment, etc. The largest merchandise offerings are usually found in operations that combine on-the-shelf merchandise with catalogue services.

A small store can be started with only one or two salespersons, and utilize whatever expertise the recreation director or some other association member may possess. As the operation grows in size and diversity, it will be more practical and more profitable to secure the services of a full-time store manager who has had some retailing experience. The very successful store of the Pratt & Whitney Aircraft Club, Inc. is managed by a salaried professional.

Another option is to contract with a private firm to operate the company store. The latter may seem to be the simpler solution, but it still calls for a good deal of supervision from someone in the recreation association. The Texins (Texas Instruments) store is managed by a private company. This company controls the sales area, determines buying procedures, controls the inventories, and handles sales. The Texins receive a sliding percentage of the profits.

Whatever the method of operation of the association store, it should not be looked upon as the personal responsibility of the director of recreation or the employee fitness director. These people have a host of other responsibilities that are of even more importance to the association.

The popularity of employee association stores depends upon a number of factors, chief of which are the quality-price relationship and convenience. The value of such a store as an employee service is demonstrated by the expereience of the Chase (Bank) Employees Club in New York. After the establishment of the Chase Employee Store and Pharmacy (ESP), membership in the Chase Employees Club quickly jumped 50% to 18,000. ESP has a former J.C. Penney employee as its manager and provides full-or part-time employment for 16 others.

The Pratt & Whitney Aircraft Club store has also been very successful and should inspire other employee associations. It began in 1971 with one small sales desk where logo jewelry and candy were sold. A year later the operation was expanded to a retail store that offered a few fair-traded items with a very small mark-up. In 1973, a larger number of fair-traded items were offered, at a higher mark-up, though still selling at less than the prices of area retail stores. In 1974, most of the fair-traded merchandise was dropped, and regular merchandise was offered at a 20% mark-up, well below competitors' prices. The success is evidenced by the fact that in the latter year, the store profit was the third largest source of income for the P & WA Club, and it's still growing. From its modest beginning, the P & WA has grown into a large and sophisticated operation with outlets in four different company locations. It is professionally managed with a computerized inventory control system utilizing Pratt & Whitney data processing equipment.

The idea of an employee association store will probably have to be sold to Management. Here are some strong sales points.

1. The store can be a very substantial contributor to the employee association's funds. Thus it can either relieve the company of some of the burden of funding a fitness program, or it can expand the activities and services of the association.

2. It is a fringe benefit which employees see both as a convenience, and a money saver.

3. Employees stay on the premises to do their shopping, so they are not likely to be late getting back from lunch.

Not every sales operation need be a colossus, and there are a number of other employee association sales promotions which are less extensive, but do render a service and raise revenue. One of these is the retail outlet for employees only. Such an outlet sells only company produced items, at prices far less than the public must pay. These outlets are good for advertising, morale and company loyalty.

Selling "loyalty" items, e.g., sweat shirts bearing the name and insignia of the employee association, are also a viable form of sales operation.

3. Group Travel Service

Group travel service is mentioned here because this kind of venture can be operated in the same facility or in conjunction with the association store. Each is managed by a different professional, as different expertise and experience is needed.

Group travel saves money for the members because of the group's bulk purchasing power. The employee association can receive a discount for this block buying from the transportation agencies, as do any other travel service. The association travel service may also arrange for special accommodation and receive appropriate commissions from hotels and restaurants or amusement places. This extra income is gained at no expense to the members. It is the travel service's responsibility to ensure that the accommodation or other arrangements are of good quality and fairly priced.

4. Photographic Service

A photographic service (film and development) can be offered alone or as part of a store operation. Little space and very little investment is required. Such a service is a definite convenience for the association members and can generate considerable income.

5. Coin-Operated Games

Coin-operated games in an association centre, employee cafeteria, lounge or locker room may encourage participation and provide significant extra revenue. As with vending machines, care must be exercised in the selection of the operator. An association member should supervise these activities through liaison with both players and the operator.

6. Full-Length Movies

Some employee clubs have great success offering full-length movies to employees and their families. Many of these films are very recent, and have just completed first-run showings in city theatres.

In situations where the association has a suitable recreation hall for the showing of movies, and the association members live reasonably nearby, movies can be an excellent source of revenue. One enthusiast has suggested that profit from popcorn and candy sales be used to pay for film rental, so that the modest admission prices are pure profit for the association. Certainly, this suggestion should appeal to everyone. Some clubs offer lunch-time movies and occasionally put on a show for employees' children.

7. Dining Rooms

The general opinion seems to be that, unlike vending machine operations, dining rooms bring in little or no profit and are just not worth the trouble.

The truth is that, *if well managed*, any enterprise that makes money in the business world can make money for some employee associations. That the dining room is no exception is evidenced by the experience of the NASA Exchange at the Johnson Space Center at Houston, Texas. The club dining room profits provide approximately 20% of the total club budget. Operating under professional management, it not only serves as a daily dining room, but caters about 100 special banquets annually.

8. Investing

The sums of money handled annually by the larger employee activity associations are more than most of us earn in a lifetime. Not all the income is used immediately as it is produced. Where the interval between income and expenditure is a matter of months, idle money should be invested. For large associations, wise investment practices can be the source of many thousands of extra dollars per year.

9. Recycling Programs

There is a tendency to think of recycling programs as the penny ante of fund-raising activities. However, if they are well organized and directed,

as at Control Data's employees clubs, recycling can be extremely profitable. Of the 27 clubs at Control Data, 19 are active in a recycling program. Each club has a recycle chairperson who oversees the placement of bins, co-ordinates the activities, and urges other employees to make contributions.

The programs would not succeed to the extent they do without the co-operation and practical assistance of the Facilities Administration people. Facilities Administration arranges for the internal collection and delivery of waste paper to the bins or shipping docks. This benefits the Company as it is waste that Control Data would otherwise have to pay someone to haul off. Large amounts also come from the homes of the employees.

Not all companies generate the amount of waste paper that Control Data does; but it is likely that every large business organization discards tons of waste paper every year. And, believe it or not, the average household in North America discards somewhere in the neighbourhood of a ton of waste paper annually. Given these figures, a recycling operation could be highly successful, even if revenue fell far below that of the Control Data clubs, for whom recycling produced more than $100,000 in 1976.

10. Ticket Sales

Some employee associations handle ticket sales for sports events, movie theatres, theatrical performances, special events (circus, etc.), dinner/theatre bookings, and even hunting and fishing licenses. The sales commissions they receive from these activities goes into association revenue.

11. Games of Chance

Games of chance including lotteries, bingo, raffles, casino nights, etc., are popular fund-raising devices.

12. Other Funding Sources

It would appear that the sources of funds are almost limitless, and depend largely upon the initiative and the imagination of the employee activity director and the association's governing board and officers. Additional sources include pay telephones, employee gasoline pumps, and special fund-raising events.

Though considerable emphasis has been placed on potential sources of fund raising, it must be remembered that the raising of funds should not become such a consuming interest that insufficient time and energy are left for the development and administration of the fitness program and services.

With this reservation, it must, however, be reiterated that the employee association possessing a varied source of funds is more secure and probably better off than one which relies on just one or two sources.

Conclusion

This section on financing fitness programs has attempted to discuss various types of employee fitness programs and facilities, their initial and ongoing costs, and the many permutations of employer-employee contributions. In considering all these factors it seems that the first step is for everyone to agree that a fitness program is necessary. Once this has been ascertained, then the specifics can be developed.

It has also been pointed out that facility considerations should include a commitment from the employees to help in the renovation or construction work. This concept has proven to be effective for industrial recreation programs and has merit for employee fitness programs as well.

It has also been demonstrated that there are many possibilities open to a company or employee association to reduce initial and ongoing costs. Once again, much of this potential has not yet been effectively developed in relation to employee fitness programs.